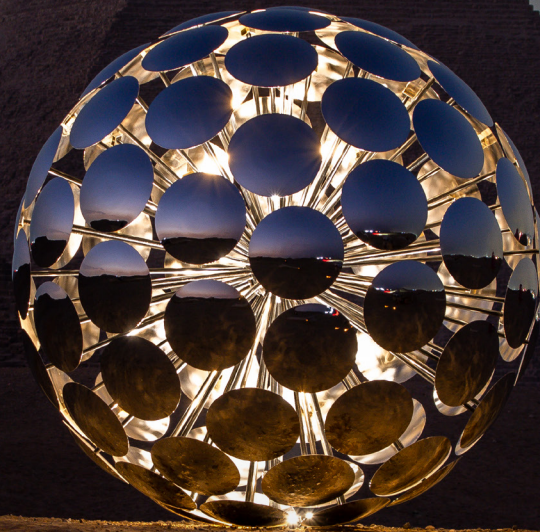


# GLOBETRENDER

2023 TRAVEL TREND FORECAST



in association with

**HotelPlanner**

Welcome to Globetrender's 2023 *Travel Trend Forecast*, produced in association with HotelPlanner – a hotel deals booking service specialising in negotiated group hotel rates, extended stays and corporate meeting planning. Support for this research has also been provided by Shangri-La Hotels and Resorts, and J Public Relations.

In this forecast, Globetrender has identified 11 trends that will have particular significance in 2023. Our number-one trend is "China Boom" – after three years of closure during the pandemic, the country is finally dropping its "zero Covid" restrictions and opening its borders to international travel. Although this promises to be positive for the global tourism economy (in 2019, spending from Chinese travellers amounted to US\$255 billion – the most of any nation) there will be a significant human cost as unvaccinated people in China succumb to Covid-19. This will be a terrible tragedy. As "Variant Paranoia" grips foreign governments, there will be renewed entry restrictions imposed on travellers from China but these will be short-lived and unwarranted unless a vaccine-resistant new Covid strain emerges.

The other trends Globetrender has identified and coined are: "Sovereign Power", "Low Cost, Low Season", "Rebel Spending", "Long-Term Planning", "Indigenous Appreciation", "Meta Destinations", "Life-Hacking Retreats", "Modern Family Travel", "Dry-Cations" and "Carbon Anxiety". Of course,

this is not a comprehensive list so for on-going and real-time travel trend analysis, we invite professionals to subscribe to our premium newsletter VOLT ([globetrender.com/volt](https://globetrender.com/volt)), which delivers weekly intelligence on the future of travel.

In spite of the fact that a third of countries around the world will be in recession in 2023, or will be experiencing economic conditions that feel like recession (according to the International Monetary Fund), average earners will be doing everything they can to get at least one holiday in the year ahead. Travel is something few people want to sacrifice anymore. Among high-earners, there will be defiant spending on lavish hotels, eye-popping experiences and round-the-world adventures. According to Research and Markets, the luxury travel market is poised to grow by US\$703 billion between 2023 and 2027, accelerating at a compound annual growth rate of 11.5%.

Emma Hartland-Mahon, senior managing director of J PR, says: "Early data points to a very positive year for luxury travel. Pandemic lockdowns have caused many people to re-assess their priorities, but travel still emerge as pre-eminent. Value for money, however, will be a key theme for the year. With latent demand showing no signs of abating and holidays remaining a priority purchase for most, there is great optimism for the year ahead".

Tim Hentschel, CEO of HotelPlanner, says: "Predictive analytics and actionable business

intelligence is key to meeting the diverse needs of travellers, so we are incredibly excited to be sponsors of Globetrender's latest trend report. HotelPlanner is a London-based travel technology provider and we're projecting that 2023 will be the 'Year of the Asia-Pacific Comeback' as China comes out of lockdown and allows unfettered travel abroad.

"HotelPlanner is forecasting an 8% average increase in hotel occupancy globally this year, largely due to China relaxing travel restrictions coupled with the on-going return of group and corporate travel. However, HotelPlanner cautions that it will likely take the entire year before China and Asia-Pacific have fully recovered. The other trend HotelPlanner is bullish about is the millions of new digital nomads travelling city-to-city and requiring extended stays. This trend is becoming a permanent new revenue stream for the hospitality industry and is encouraging millions of people from around the world to work from anywhere."



**JENNY SOUTHAN**  
EDITOR, FOUNDER & CEO OF GLOBETRENDER

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# ‘WE BELIEVE THE FUTURE IS KNOWABLE’

**Globetrender is the UK’s leading travel trend forecasting agency and online magazine dedicated to the future of travel.**

Founded by Jenny Southan, Globetrender delivers cutting-edge insights into how people will be travelling in the 21st century, giving professionals the knowledge they need to future-proof their businesses.

Globetrender’s trend reports are read by thousands of travel industry professionals, as well as executives from a wide-variety of multinational

corporations looking for insights into the future of travel and consumer behaviour.

Globetrender’s also publishes two newsletters - free weekly innovation briefings and a premium product called VOLT, which explores emerging travel trends in depth on a weekly basis.

Consulting and trend-based strategy is central to Globetrender’s offering. Jenny is also available to book for public speaking engagements including webinars, talks, live broadcasts, workshops, panels, conferences and conventions.

**Contact: [jenny@globetrender.com](mailto:jenny@globetrender.com)**



**JENNY SOUTHAN**  
EDITOR, FOUNDER & CEO

Jenny has 15 years of experience working as an award-winning travel journalist, with ten years as features editor of *Business Traveller* magazine – a job that enabled her to travel the world. In addition to running Globetrender, she freelances for titles such as *Condé Nast Traveller*, *The Telegraph* and *RoadBook*, and is a regular travel commentator for BBC Radio.

Design by Ben Southan

# ANALYSIS & TREND FORECASTING

At Globetrender, we focus on qualitative research underpinned by quantitative data.

We always consider how the life cycle of a trend moves from the innovators that trigger them on the minority fringes to the early adopters, early majority, late majority and, finally, the laggards.

When searching for trends, we apply the "three times" rule. A one-time occurrence is an anomaly, twice is a coincidence and three times is a trend, worthy of further exploration.

The identification and naming of trends is based on IOI: Intuition, Observation and Investigation. This is both a creative and academic process.

For every "micro" trend, we also consider the "macro" trends that represent the wider cultural shifts in consumer desires, motivations, values and behaviours around the world.

These are based on STEEP – Social, Technological, Economic, Environmental and Political – forces.

Innovation is at the root of every trend, so we are

always looking at what is new and disruptive. Just like news reporters, we ask the questions "who", "what", "where", "why" and "when?" – but like investigative journalists, we then dive much deeper.

By discovering multiple examples of a trend, conducting desk- and field-based research, interviewing insiders and producing case studies, "qualitative" proof of it is generated.

At Globetrender, we rely on our unique access to travel industry experts and ongoing consumer observation to remain ahead of the curve.

Email [jenny@globetrender.com](mailto:jenny@globetrender.com) for bespoke consulting on the future of travel.

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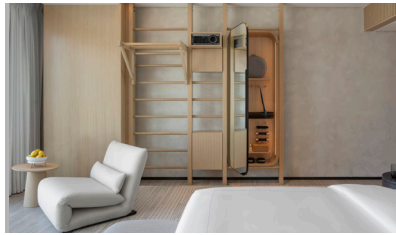
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# CHINA BOOM

After almost three years of closure, China is finally reopening to international tourism with the removal of strict Covid border restrictions for both inbound and outbound travellers.



# CHINA BOOM

China has announced that it is abandoning its "zero Covid" policy and is opening back up to the world from early 2023. This is hugely significant because it's the Earth's biggest source market for global tourism – in 2019, the number of outbound tourists from China totalled 155 million (compared to 100 million from the US, the world's second-biggest source market) with spending amounting to US\$255 billion (US\$132 billion from the US), according to data from the UN World Tourism Organization.



Not only do the new measures grant greater freedoms to Chinese citizens who want to travel overseas again (from January 8, 2023, Chinese citizens no longer need to provide a reason to the government and are now able to apply for passports again) but they also allow the country to welcome inbound visitors more freely. The most significant step forward has been the scrapping of hotel quarantines for

inbound travellers (they will need to take a PCR test before departure) and the removal of a cap on the daily number of flights allowed into China. This will mean airlines will launch new routes and increase services to cities all over the country in the months ahead.

The reopening has been sudden, of course, and there will be challenges to overcome. *Bloomberg* writes that there could be a "deluge of Covid

deaths" in China in 2023, with London-based predictive health analytics firm Airfinity warning that as many as 1.7 million people living in China could die by May because of new exposure to the virus and low vaccination rates. From a global perspective this will trigger fears of new variants escaping from the country via departing air passengers, which is why negative Covid-19 pre-departure tests will be required by many

international destinations, at least in the short-term.

On December 29, 2022, Hong Kong also relaxed a number of key Covid protocols including PCR testing on arrival and Day Two, in a bid to revive the economy. Critically, it scrapped its hotel quarantine requirement for inbound travellers in October 2022. (Up until then, inbound travellers had to be confined for two to three weeks, and to wear tracking

devices.) To kick-start tourism, the Hong Kong Tourism Board will be giving away 500,000 free plane tickets this year, as well as launching a global ad campaign called "Hello Hong Kong" and scheduling dozens of headline-grabbing "mega events".

Dr Pang Yiu-kai, chairman of the Hong Kong Tourism Board, said in a statement: "The new measures mark a key milestone for tourism revival and

the full reopening of the tourism doors of Hong Kong. Visitors can now fully enjoy Hong Kong's diverse offerings once they arrive in town. We believe this will attract visitors from around the world. Taking into account the pace of outbound travel resumption in different visitor source markets, the HKTGB will gradually step up its promotions worldwide to uphold Hong Kong's status as a world-class travel destination."

What will be the most popular countries in 2023 for outbound travellers from China? According to Shanghai-based online travel agency Trip.com, Singapore has led the initial surge in flight bookings, followed by South Korea, Japan and Thailand. In terms of domestic and inbound tourism to China, a slew of new hotel openings will be a huge draw. Among them will be the Four Seasons Hotel Suzhou on a private island in Jinji Lake, and the Raffles at Galaxy Macau.



**Andy Washington,**  
general manager EMEA,  
Trip.com

### **What is Trip.com?**

"Owned by Trip.com Group, which is based in Shanghai, Trip.com is an international one-stop travel service provider available in 24 languages across 39 countries and regions in 29 local currencies on 48 sites. It has an extensive network of more than 1.2 million hotels and flights from over 480 airlines covering 2,600 airports in 200 countries and regions around the globe."

### **How are you catering to younger generations of travellers?**

"We know that many of our customers are younger and they're using different social media channels, so it's about how we adapt to meet their needs. That's why our 'mobile-first' approach is integral to Trip.com's current and future operations and growth plan. One of our target markets is Generation Y. They predominantly book

travel through apps, and 90% of our bookings from Asia are made through the app. We strongly believe Europe is going the same way and we want to position Trip.com so it is ahead of the curve to exploit this change.

"Our vehicle for change is the app, which can be used to make and amend bookings while on the move. The whole end-to-end travel experience can be navigated through the app, from inspiration via social media, through to search, booking and after-care. With the user's complete journey in mind, we are doing everything we can to make sure that it is easily accessible and always reliable. For example, we recently launched auto refunds on flights."

### **What are you responsible for in your role?**

"As general manager for Europe, the Middle East

and Africa at Trip.com Group, I am responsible for building the global online travel agency's European base and building out into the broader region. For me it's about looking to the future and consumer patterns; where demand lies and what the data is telling us. What excites me about my role is the opportunity to grow both our domestic markets and the inbound market – utilising the customer base from China."

### **How is Trip.com evolving as a company?**

"In a highly competitive industry, Trip.com has worked incredibly hard to develop USPs and differentiate itself from other brands in the marketplace. Our core business was as a flight operator, however, providing accommodation through our platforms is now bringing additional volume into the business. Trip.com Group has experienced

rapid growth and global expansion. Our mission is to provide a truly unique travel experience for our customers, and to be considered the 'perfect trip companion'. To achieve this we have undertaken a strategy to improve our coverage in terms of languages, countries and currencies, and strengthen our business partnerships across the travel and tourism sector to encompass as many destinations as we can."

### **What booking trends are you observing for travel in 2023?**

"Travel is continuing to rebound from the effects of the pandemic with Trip.com Group recording a net revenue in Q3 2022 of US\$969 million – a year-on-year increase of 29%. We are looking at longer booking windows and the return of short-haul city breaks. Customers also appear to be booking fewer trips, however, the length of

those trips has been growing and, in turn, spend. For example, the average spend by Americans on European hotels has increased by nearly a quarter (23%) in the last year. Increased demand for overseas travel, coupled with more flexible work schedules in remote working environments, appears to be producing a trend towards year-round demand to many destinations. This means destinations that were traditionally more popular in the summer months or school holidays are effectively losing their shoulder and down seasons. Transatlantic travel has also taken off and beach breaks remain popular."

### **What will be the impact on global tourism now that China has reopened its borders?**

"The reopening of mainland Chinese borders is a hugely significant event in the recovery of travel and

heralds the welcome return of Chinese tourism. On the first morning of the announcement on December 27, 2022, Trip.com Group alone recorded a staggering 254% increase in mainland China's outbound flight bookings compared to a day earlier. This rush to book flights comes after almost three years of border closures.

"Flights to Singapore led the surge, leaping six-fold, with the other four top outbound tourist destinations – South Korea, Hong Kong, Japan and Thailand – soaring by an average of 400%. Bookings for long-haul flights to the UK, the US and Australia also experienced a significant increase. Trip.com Group data shows that bookings for inbound flights on December 27 rocketed by 412% from the day before with Australia, Germany, Japan, Singapore and Hong Kong topping the

list as the largest source markets of inbound bookings, with travellers eager to explore China once more."

## **What are your ambitions for becoming a leading OTA in Europe?**

"We want to be the number-one online travel agency in Europe. Our strategy is to anticipate the needs of consumers and use technology and the power of digital to provide the very best in customer service,

while providing an unequalled array of products and services. We exist because we add value to consumers and airlines. We aim to be a disruptor, to shake up the market and attract customers through our value-added proposition."

## **How are you using data to better understand what customers want?**

"Data helps us identify consumer patterns and where demand lies. Global air ticket bookings have increased by 100% year-on-year. In

2022, Trip.com Group's first-ever *Sustainable Travel Consumer Report* revealed that nearly 80% of those questioned said they attached great importance to environmental factors when travelling, and nearly 70% of respondents said they were willing to pay higher prices for more sustainable travel."

## **What travel trends do you think will be most significant in 2023?**

"Efficiency, price, all-in-one and top customer service, which are all areas that Trip.com aims to be the best in. We have identified a rise in demand for luxury hotels and, interestingly, they are now becoming a destination in their own right. There is also an increasing desire for travellers to participate in private tours and boutique group trips to get a more curated approach to genuine and authentic experiences."



# SOVEREIGN POWER

Following the death of Queen Elizabeth II in 2022, the UK will be witnessing the coronation of a new king in 2023, and reformulating its status on the world stage.



# SOVEREIGN POWER



comes a new Carolean era under the reign of King Charles III, who is set to be coronated with the Queen Consort, Camilla, on May 6, 2023. The event in itself will be a significant lure for international tourists but the occasion also marks an unprecedented “fresh start” for the UK, the Commonwealth and even the royal family itself in the eyes of the world.

During the course of the Queen's seven-decade reign, she travelled more than a million miles and conducted 290 state visits to 117 different countries. She visited every country in the Commonwealth – most frequently to Canada, 27 times – and set the trend for exotic foreign trips in the 1960s, when package holidays were born. Not long after her coronation, in her 1953 Christmas broadcast, she said: “I set out on this journey in order to see as much as possible of the people and countries of the Commonwealth and Empire. I want to

show that the Crown is not merely an abstract symbol of our unity, but a personal and living bond between you and me.”

In 2023, a new kind of Sovereign Power will be forged – one that must contend with everything from repairing relations with the Sussexes (Harry and Meghan) and upholding the Commonwealth, to navigating the on-going climate crisis and the war in Ukraine. For the only country in the world that doesn't have to bear its name on its stamps, there

is also an opportunity for the UK to capitalise on the new image it is creating – literally. This year, new coins and banknotes depicting the face of King Charles III will be minted and printed – not just in the UK but in Commonwealth countries such as Australia, New Zealand and Canada too.

In the coming months, travel and tourism will be closely interlinked with the new monarch – not only can London and the UK expect a surge in overseas visitors (especially from countries such as

China, which is only just reopening and was the second-biggest spender in 2019, behind only the US) but in the form of a mammoth royal world tour that could last as long as two years. To mark the start of King Charles's reign, stops will include Australia, New Zealand, Canada, South Africa and the Caribbean in a bid to boost support for the Crown, as well as France and Germany to bolster post-Brexit relations. For travel companies and tourism boards, there will be plenty of opportunities for spin-off marketing.

After reigning for 70 years, Queen Elizabeth II died on September 8, 2022, at the royal residence of Balmoral in Scotland. Among her

many achievements, Her Majesty was the most-travelled monarch in history – and she didn't even own a passport. With her departure





# LOW COST, LOW SEASON

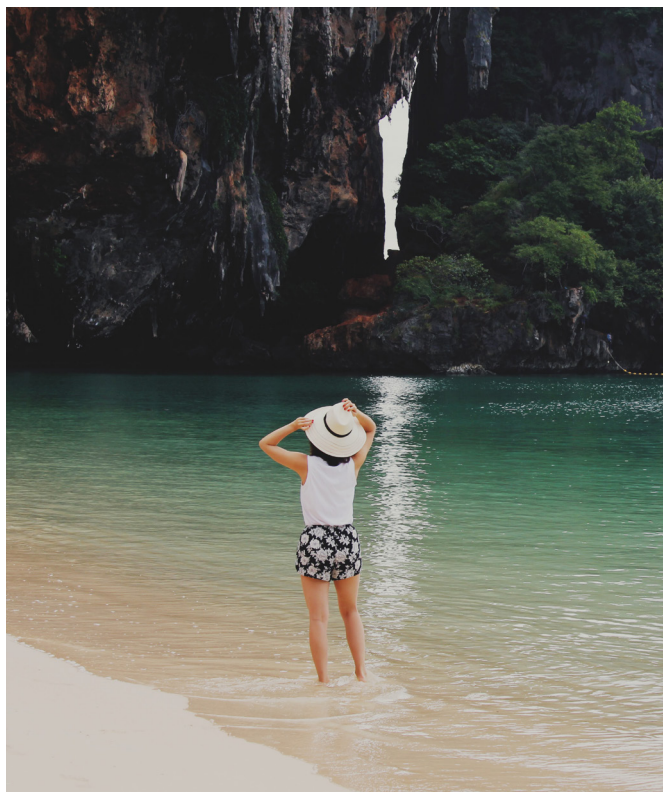
In spite of the rising cost of living, many people worldwide will be determined to travel in 2023 but they will also be highly price sensitive.

## LOW COST, LOW SEASON

In 2023, one third of the world's economies will be in recession. Even for countries that are not in recession, it will "feel like recession for hundreds of millions of people," says Kristalina Georgieva, chief of the International Monetary Fund (IMF). The reason that this year will be even tougher than 2022 is that the three biggest economies – the US, EU and China – are all slowing down simultaneously.

Although the US may not actually enter recession, the IMF predicts that half of the European Union will. Georgieva says: "For the first time in 40 years, China's growth is likely to be at or below global growth." In fact, experts predict that even though China is now opening up again, it is not forecast to pass the US as the world's largest economy until 2036. Or even 2060, suggests Ruchir Sharma in the *Financial Times*.

When it comes to mass tourism among the working and middle



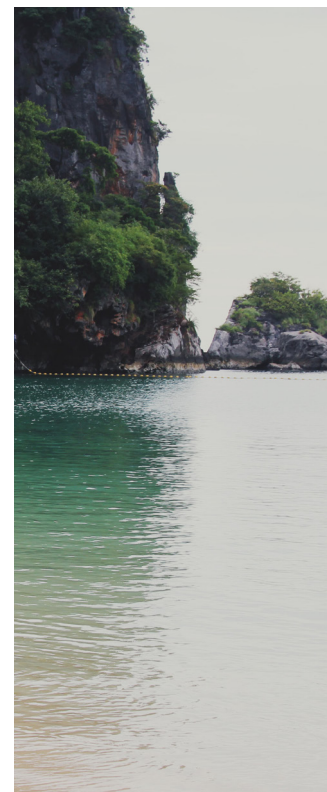
classes, the impact of the cost-of-living crisis means they will have less disposable income to spend in 2023. That's not to say they will forgo vacations entirely (the desire and intention will remain) but consumers will be far more strategic. In so doing, "Low Cost, Low Season" travel will gain prominence as

people book during sales periods; do more research to find the best-value countries; and weigh up the pros and cons of expensive long-haul flights to cheap destinations, versus budget short-haul flights to more expensive destinations. Many will also compromise on getting perfect weather for the

sake of visiting places off-peak when flight and hotel prices are lower (this will help ease overtourism, too).

In 2022, the world's most expensive cities were New York, followed by Singapore, Tel Aviv, Hong Kong, Los Angeles and Zurich. These will be best avoided by anyone but the rich. More budget-friendly destinations that will boom in popularity will be Turkey, Thailand, Vietnam, Bali, India, Nepal, Bolivia, South Africa, Mexico and Morocco.

Antonio Fellino, managing director of online travel agent Travel Republic, says: "Brits are clearly looking to make sure that they get the best value they can by booking two-week holidays, rather than one week, but foregoing their mini breaks. It's typical of what we tend to see during times of economic downturn, but their yearly holiday remains sacrosanct."



In terms of vacation duration, Travel Republic says it is seeing a 60% growth in 14-night breaks for summer 2023 versus 2019, with seven-night trips remaining flat.

During the pandemic, travellers would go wherever was open and relatively easy to access; in the post-pandemic era, Google searches

during the trip-planning phase will largely begin with "cheap holiday destinations". According to *The Times*, some of the best-value destinations for 2023 will include Portugal, Sri Lanka, the Gambia, Mauritius, Jamaica, Bolivia and Albania. In fact, a report in *The Guardian* recently predicted that the Balkan country of Albania "will become a mainstream holiday destination for UK travellers after a surge in bookings this January [2023]".

On the other hand, destinations such as Australia that were popular among backpackers before the pandemic may be too expensive in 2023. According to Nomad hostels owner Tourism Adventure Group, prices have gone up by almost 50%. The benefit of the "Low Cost, Low Season" trend will be a rebalancing of tourism spend and footfall in favour of destinations that really need it.

Unsplash



# REBEL SPENDING

High-earners with significant savings will be splashing the cash in 2023, taking advantage of open borders and unparalleled luxury travel inventory – from new jets and yachts to resorts and VIP experiences.

# REBEL SPENDING



If you want to understand the spending habits of the rich, just look at the champagne market. In spite of a global financial crisis, there is a shortage of premium fizz – bottles are flying off the shelves as a new wave of hedonism grips the elite. 2023 is going to be a stellar year for luxury travel too, as the wealthy show no restraint when it comes to booking lavish hotels, chartering private jets and yachts, and hiring experts to organise next-level adventures. Even the HENRYs (high earners, not rich yet) are defiant when it comes to curbing their enthusiasm.

While low-income and middle classes struggle financially, those at the top keep profiting. In fact, according to investment bank Credit Suisse, there has been a post-pandemic “explosion of wealth” – Credit Suisse Group AG’s Global Wealth Report 2022 forecasts that by 2026, there will be more than 87.5 million people worldwide with at least US\$1 million in wealth, up from 62.5 million in 2021 (that’s five million more millionaires per year – or an average of 13,698 per day). Against a backdrop of global recession, Rebel Spending means the

money will keep flowing, and the luxury travel market has a unique opportunity to cash in.

According to a study from Clarfeld Citizens Private Wealth, the majority of high- and ultra-high net worth Americans plan to spend the same amount (51%) or more (29%) in 2023 than they did in 2022. What are they most likely to splurge on? Travel. US-based luxury travel agency network Virtuoso has also observed that travel sales for 2023 are 47% higher than 2019. The data is echoed by findings from a global survey conducted by market research firm Altiant for the International Luxury Travel Market (ILTM) trade show in Cannes, which revealed that 60% of 1,200 high-net-worth respondents intend to spend more on travel in 2023, compared to just 10% who say that they will cut back.

Kicking off the new year will be one of the most outlandish hotel openings on the planet – Dubai’s Atlantis the

Royal, which describes itself as “the most ultra-luxury experiential resort in the world”. The perfect example of Rebel Spending in the luxury travel sector, the opening party for the hotel alone will have cost many millions of dollars – a huge chunk of which will be going to Beyoncé, who will be performing live at the “ribbon-cutting”.

Emma Hartland-Mahon, senior managing director at J Public Relations, says: “Whilst it’s widely known that the 1% are ‘recession proof’, a YOLO ‘you only live once’

mentality among the middle classes has meant that a larger percentage of travellers have been ‘rebel spending’, not just luxury travellers. Homing in on the luxury sector, our clients in Q1, 2023, are already reporting guests pulling out all the stops despite the current economic uncertainty. From longer stays, to upgrades to the best categories of rooms, travel via private jets and bringing bigger groups – clients are citing a 20% increase in average holiday spend. We are also seeing exclusive-use on the rise – hotel buy-outs are very

popular as are high-end, all-inclusive resorts.”

Also opening in Dubai this year will be Dorchester Collection’s first property in the Middle East – the Lana. With competition hot among luxury travellers to book the best suites in the newest hotels, there will be a race to stay in other debut properties across the world too, no matter the price tag. Contenders include the Raffles London at the OWO, Six Senses Southern Dunes in Saudi Arabia, Kona Village, A Rosewood Resort in Hawaii and the Peninsula Istanbul.



## Q&A: HOTELPLANNER



**Tim Hentschel, co-founder and CEO of HotelPlanner**

### **What is HotelPlanner?**

"Founded in 2003, HotelPlanner is one of the world's top providers of individual, group and corporate travel bookings, specialising in unique 'Closed User Group' discount rates offered in unpublished private sale environments. The platform combines artificial intelligence capabilities, a 24/7 global gig economy-based reservations and customer service network, to serve all traveller hotel needs from a single platform."

### **Who are your target markets?**

"We're a London-based company providing a direct booking service for a variety of travel purposes, from individuals and families looking to experience the holiday of a lifetime to sports teams, corporates and wedding parties looking to remove the hassle

of booking multiple rooms for large groups. We serve a large customer base across several markets such as Europe, Asia and the US. HotelPlanner is a reliable, seamless and innovative platform to source the best possible rates and value across more than one million hotel properties and alternative accommodations globally.

"We also have long term partnerships with the world's largest online travel agencies, well-known hotel chains, individual hotels, online wedding providers, ancillary lodging providers, corporations, sports franchises, universities, tourism boards and government agencies. There are more than 4,000 HotelPlanner affiliates actively using HotelPlanner's patent-pending AI-enabled technology, and more than 100,000 hotels and meeting venues

worldwide actively loading in room inventory within the HotelPlanner network on a daily basis."

### **In what ways is it innovative?**

"Our proprietary AI-based tech platform is one of the most customised and personalised ways to book hotels, giving us a substantial market cut-through and unique selling point. We believe in providing a personalised service for customers, as well as a flexible and convenient hybrid working model for our employees and remote agents using technology.

In 2020 HotelPlanner launched a first-of-its-kind gig-economy call centre, which now has more than 8,000 gig agents onboarded remotely, with a high-tech and high-touch concept in mind. This included an AI and voice over IP-enabled platform.

"We have also launched various AI inspired partnerships and adaptations such as an Alexa-enabled hotel booking feature that immediately connects customers to a global gig-based 'Hotel Planner' agent to book a discounted hotel stay – anywhere in the world – at any time."

### **What booking patterns have you been observing for 2023?**

"Some of the most popular searched destinations for 2023 include London, Cancun, Tokyo, Paris, Dubai, Amsterdam, Barcelona, Berlin, Munich, Rome, Madrid, Manila and Mexico City."

### **Which destinations do you think will be most popular in 2023?**

"Asia-Pacific destinations will be quite popular in 2023 as China comes out of lockdown and the entire region welcomes more inbound Chinese

travellers and others. Popular destinations include the Maldives, Bali, Philippines, Indonesia, Vietnam, Fiji, Tokyo, Australia and New Zealand.

"Destinations in the Southern Balkans offer a refreshing and affordable option for those looking to get the best value for their travel whilst also experiencing a culture different to the traditional offerings of beach resorts in Western Europe. The favourable living costs in the Southern Balkan region and the fact that many destinations are accessible via affordable public transport is enough to suggest that guests can get more value for their stay.

"Travellers today are seeking value, but also culturally immersive and experiential vacations where they live and eat like the locals in off-the-beaten-path destinations during off-season, such as the southern Balkans."

## What does the reopening of China mean for international travel in 2023?

"We're projecting that 2023 will be the 'Year of the Asia-Pacific Comeback' as China comes out of lockdown and allows unfettered inbound, outbound and domestic travel. HotelPlanner forecasts an approximate 8% average increase in hotel occupancy globally, largely due to China relaxing travel restrictions coupled with the ongoing return of group and corporate travel.

"We are confident that China is going to be the major catalyst this year in driving the Asia-Pacific recovery, but we must caution that it will likely take the entire year before the region is back to a pre-pandemic steady state, and future outbreaks could certainly delay a full recovery."



## What travel trends do you think will be most interesting in 2023?

"In the UK specifically we're seeing pubs open up their upstairs rooms as a more affordable and convenient lodging option, broadening the accommodation choice for consumers. A comfortable yet affordable room right above a charming pub with great food and drink could be the perfect option for cost-conscious travellers compared to a more expensive hotel in the city centre.

"Another key trend is the use of travel as a wellness boosting technique, one of the biggest trends to emerge from the pandemic. This is not just during a January detox or 'sober October', but year-round. The options are endless and evolving – from fishing, hiking, skiing, open water swimming and camping trips – to spa, yoga or wellness retreats that incorporate CBD or vitamin treatments, massage, music, art and UV light therapy, digital and alcohol detox, spiritual retreats, and even psychedelic

plant medicine such as ayahuasca."

## What are you observing in terms of consumers' sensitivity to price in 2023?

"Naturally the onus is on value-for-money as consumers come to terms with the rising cost of living, but we are buoyed by the knowledge that travelling abroad next year remains a spending priority for the British public. Recent reports have pointed towards Brits looking to reduce other non-essential activities such as eating out and

clothing shopping, before rethinking holiday budgets.

"Consumers are looking for more package holidays and value add-ons, such as all-inclusive access, free 'upgrades' or cost-cutting services such as shuttle transport. This is increasingly at the heart of booking behaviour, and as a result, more hotels are offering free half board dining deals and 'children eat/stay free' offers for example."

## How far ahead are users typically booking?

"Among the approximate 30,000 bookings made each month on HotelPlanner, as of early January 2023, only 14 of our customers have booked trips for 2024. No one has booked for 2025 yet so it's a small number who are booking a year in advance. That said, we are seeing customers book more in advance this year compared to last year since travellers now have more confidence that countries are far less likely to suddenly go into lockdown or mandate quarantines."

## What are your goals and expectations for the year ahead as a company?

"We have aspirations to employ the latest artificial intelligence tech such as Chat GPT to enable customers to search and book hotels entirely through AI. That would be an industry game changer."



# LONG-TERM

# PLANNING

New horizons are opening up for travellers globally, which is giving rise to greater confidence in taking on ambitious, complex, multi-destination dream trips.

## LONG-TERM PLANNING

It's now been three years since the start of the Covid-19 pandemic, and throughout this period, billions of people have been unable to confidently plan for the future. Life has been filled with disappointments, stress, powerlessness and uncertainty. On the whole, last year was a much better year for travel but country reopenings were staggered – looking back, it's important to remember that it was only March 2022 when all UK travel restrictions were lifted. Some of the last countries to relax border protocols were New Zealand (August), Bhutan (September), and Thailand and Japan (October).

The biggest news, of course, was the reopening of China in January 2023. This means that for the first time since early 2020, tourists around the world can embark on Long-Term Planning, filling their calendars with trips not just in the year ahead, but in 2024 and 2025. Rebecca Masri, founder of private members' hotel club Little Emperors, says: "The pandemic led to the shortest lead-times we have

ever seen but now people are booking much further in advance." With this in mind, hotels, airlines and tour operators would be wise to publish rates and extend their reservation schedules as far in advance as possible.

Many consumers will already have their sights set on hotels that are opening in 2024 – standout properties include the first

Orient Express hotels – La Minerva in Rome and Palazzo Donà Giovannelli in Venice; the Six Senses Svart in the Norwegian Arctic Circle; the Hoxton Dublin; Mama Shelter Medellin, Colombia; the Rosewood Miyakojima, Japan, and Aman's Amanvari on the Sea of Cortés in Mexico. On the list for 2025 will be the Cheval Blanc Beverly Hills in Los Angeles, Edition

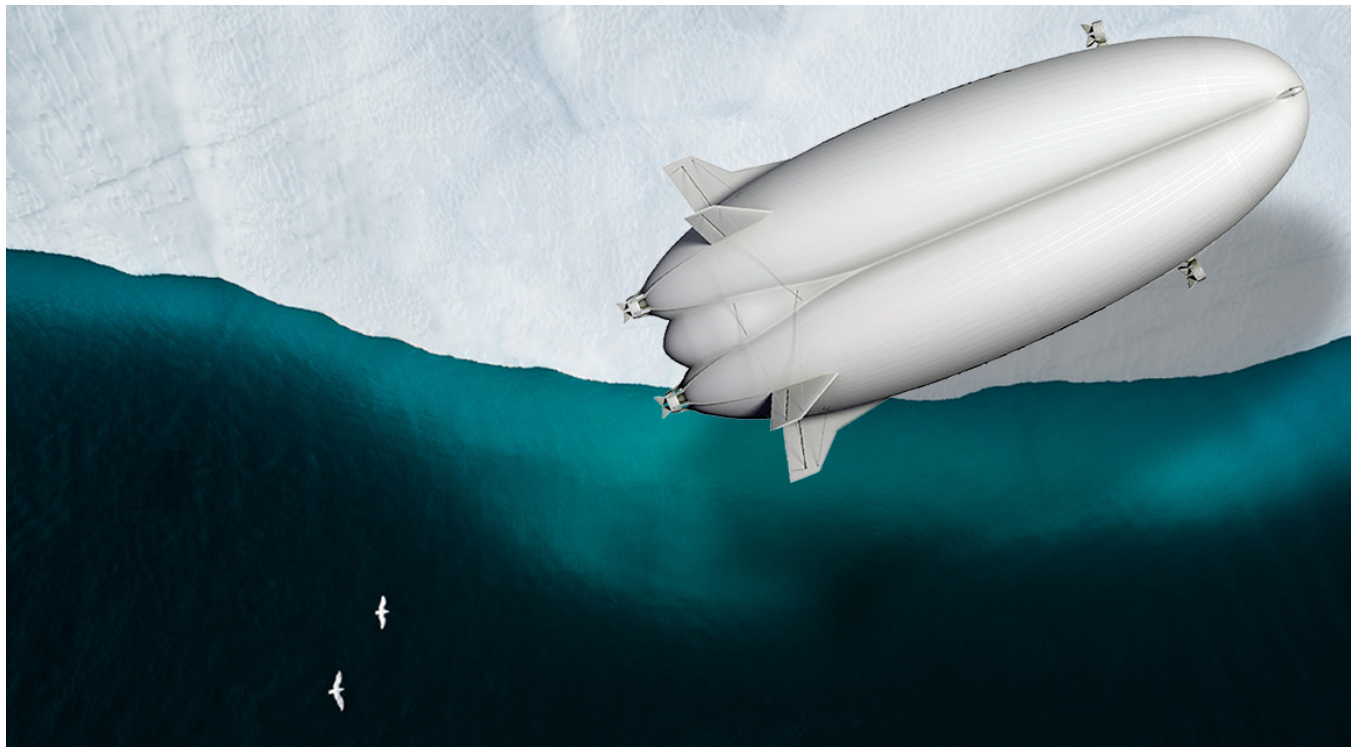
Lake Como in Italy and Park Hyatt Riyadh Diriyah Gate in Saudi Arabia, among others.

But it's not just hotels that consumers focus on. At Globetrender, we don't like to use the term "bucket list trips" because it's over-used but it's certainly true that in 2023, travellers will be doubling down on organising more ambitious, complex, multi-destination

and even multi-country itineraries, rather than nipping off for a last-minute vacation in a resort or villa. This is a trend that applies at every price point, too – whether it's a group of friends setting off for a backpacking adventure around South America, a young professional dreaming of a six-month relocation to a tropical island, a family going on a four-

week road trip over the summer holiday, a couple traversing Patagonia, or a millionaire chartering an expedition yacht for a voyage around Alaska.

As a trend forecasting agency we are more than *au fait* with looking to the future but for travellers and travel professionals, the view is typically short-term and seasonal. However, as the pace of innovation accelerates, there will be more and more extraordinary experiences coming online to book – whether it's a seat on a Blue Origin or Virgin Galactic space flight, a balloon cruise to the stratosphere with Space Perspective, an ultra-long-haul nonstop flight with Qantas between London and Sydney, a journey across the US in a Tesla Cybertruck, or an airship voyage over the North Pole with Pelorus and OceanSky Cruises. All these will be available over the next three years so consumers need to make sure they are first in line.





# INDIGENOUS APPRECIATION

For decades, native tribespeople have been overlooked and exploited, especially by the tourism industry. In 2023, greater sensitivity will lead to positive change.

# INDIGENOUS APPRECIATION

If you have watched season one of HBO series *White Lotus*, which is set in a luxury resort on Hawaii, you will have seen a clear illustration of how easily the tourism industry can end up exploiting Indigenous communities. In the case of this dramatisation, there are native Hawaiian employees who have to work in a hotel that occupies the land their families have a hereditary right to; while others present as cultural curiosities who are required to provide entertainment or pander to the egos of the privileged white guests. Even in the 21st century, many tourist experiences and hospitality providers have their roots in colonialism, meaning a radical overhaul is long overdue.

In 2023, a number of innovative companies are making concerted efforts to place the spotlight on Indigenous Appreciation – and consumers are showing interest. According to the Indigenous Tourism Association of Canada (ITAC), Indigenous tourism has been the

fastest-growing sector in Canadian tourism, increasing by 23% between 2014 and 2017, compared to a 14.5% increase in overall tourism in Canada during the same period. In 2018, ITAC and Destination Canada, the national tourism marketing organisation, found that one in three international visitors were interested in Indigenous experiences. To help cater to demand, a new website called Destination Indigenous has been launched to allow travellers to directly book experiences with companies that are at least 51% owned by Indigenous people.

In the last few years there has been more talk about ways the travel industry – and guests – can support local communities but Indigenous people should be top of the list of priorities. Why? For a start, the World Bank states that, collectively, Indigenous peoples protect 80% of the Earth's biodiversity. In many cases they are also



some of the poorest, most vulnerable and marginalised people in society. According to the IWGIA (International Work Group for Indigenous Affairs), 27% of Native Americans and Alaska Natives live in poverty. Overall, it is estimated that there are 476 million Indigenous people worldwide – 111.9 million of them living in China (plus 640,000 people from ethnic groups who are not recognised).

Leading the way with the Indigenous Appreciation

trend is Intrepid Travel, which is launching 100 Indigenous tourism experiences in 2023, ranging from bush walks with Aboriginal Australians to shamanic encounters in Guatemala. While authentic community-based tourism has always been core to Intrepid's product, Intrepid has been significantly building on its programme of Indigenous experiences since 2020. As well as in Australia and New Zealand, the company has introduced

Indigenous tourism experiences to the US, Africa, South and Central America. Sara King, Intrepid's general manager for purpose, says: "Indigenous tourism has the power to bring travellers closer to the communities that shaped their destinations, honouring their customs and unique history while paving a new path for peace and reconciliation."

In the case of the US, Intrepid Travel has set up its own dedicated Native American operations hub, which allows it to "build more meaningful and impactful relationships with its suppliers". For example, when creating the itineraries for its South Dakota trips, Intrepid makes sure to acknowledge the sensitivities of certain tourist attractions in relation to the Indigenous experience. Following conversations with Crow Nation and Lakota tribe representatives, for example, the company decided not to include a visit to Crazy Horse,

while ensuring it pursues ways to incorporate the Indigenous American perspective during visits to Mount Rushmore, which famously sports the faces of four US presidents carved into sacred cliffs belonging to the Lakota Sioux tribespeople.

Since October 2022, premium escorted tour brands Insight Vacations and Trafalgar (both part of TTC Tour Brands) have been promoting a series of new itineraries in the US that focus on Indigenous engagements on Native American reservations, as well as trips to lesser-known monuments and national parks that seek to provide greater context and appreciation for pre-colonial history and culture. Meanwhile, elite adventure travel companies such as Pelorus, Arcadia Expeditions and Cookson Adventures can organise for clients to spend time with remote tribes in places such as Papua New Guinea.

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## Q&A: INTREPID TRAVEL

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**Sara King, general manager of purpose for Intrepid Travel**

### **What is Intrepid Travel?**

"Intrepid Travel is a small-group adventure company that's committed to developing sustainable tourism experiences that are good for people, communities and the planet. We offer more than 900 trips on every continent where groups are led by local guides, and eat, sleep and get around the local way. We are travel's largest B Corp and are also the only tour operator with verified science-based carbon reduction targets. Our not-for-profit, the Intrepid Foundation, raises money for charities around the world."

### **In what ways is Intrepid Travel innovative?**

"We want to be a world leader in the industry when it comes to responsible and sustainable tourism - and being innovative is at the heart of what we do. Back in 2014,

we were the first tour operator to ban elephant rides on our trips. We've been carbon neutral since 2010 - but now we feel offsetting is no longer enough. We introduced new measures in 2022 to decarbonise our business, such as removing short-haul flights from top-selling products and using public ground transport instead. We have also introduced plant-based meals onto all our Real Food Adventure tours and partnered with slow travel specialist Byway to give our customers the chance to travel flight-free on some of our European trips."

### **Why should the travel industry be engaging more with Indigenous cultures and communities?**

"Indigenous and First Nations people have a deep connection with nature and the land, so as the climate crisis escalates, Indigenous

tourism can help to show the impact climate change is having on these communities and the environment. We can benefit from the knowledge they have built up via thousands of years of caring for their country."

### **As an Australian company, tell us more about your "reconciliation" efforts with Aboriginal and Torres Strait Islander peoples?**

"In Australia, we work closely with Aboriginal and Torres Strait Islander communities, connecting our customers to their experiences. We've grown our Aboriginal and Torres Strait Islander experiences from 12 in 2019 to 50 by the end of 2022. We make sure our tour leaders undertake cultural competency training and they're also encouraged to develop their own Acknowledgement of Country - which is an

opportunity for people to pay respect to the Traditional Owners of Country.

"We also have a Reconciliation Action Plan (RAP) in place in Australia that guides us in ramping up our commitment to reconciliation. At the end of the second year of our second RAP, we've completed 75% of the actions we committed to - these include things like developing commercial relationships with Aboriginal and Torres Strait Islander businesses and incorporating new experiences into our itineraries."

### **Tourism is often exploitative - how do you navigate this with regard to Indigenous communities?**

"We want to work in genuine partnership with Indigenous and First Nations communities and support equal opportunities. We

do this by building cultural awareness, understanding and respect among our staff and travellers, supporting employment for First Nations and Indigenous people in tourism and supporting local businesses, services and products. We've recently been involved in the first cultural tour guide training program in Victoria, in partnership with Taungurung Land and Waters Council."

### **Can you give some examples of "force for good" tourism in this regard?**

"We hear directly from our tour leaders and customers about the impact First Nations and Indigenous experiences have on their lives. Many travellers come back with new knowledge and a new perspective, after getting to hear stories, learning about the land and its people, and trying cultural practices first-hand.

## Q&A: INTREPID TRAVEL

"Earlier this year, on one of our South Australia trips, one customer said his favourite experience had been staying with Adnyamathanha hosts and learning about their respect for the land. He reflected how he'd been disrespectful to Aboriginal people his whole life, but this experience had been life-changing for him."

### **What kinds of First Nations cultural experiences do you offer?**

"We define 'First Nations experiences' as experiences that must be developed and delivered by Aboriginal people. Experiences on our Australia trips include immersive cultural experiences, like traditional spear throwing in Kuyu Kuyu and bush tucker classes where visitors learn which plants are edible. Another example is visiting an ancient site in the Flinders Ranges with a traditional owner



followed by a cultural cookout dinner."

### **Are they only available in Australia? What about other countries?**

"Our work with First Nations tourism in Australia has influenced teams in other parts of the world where we work with and visit Indigenous communities. We became a founding member of the Indigenous Tourism Collaborative of the Americas in 2021 and created an Indigenous Action Plan in Central

America that works to improve on our practices and relationships.

"Our Central America and Mexico team has introduced land acknowledgements and visits Indigenous communities on some of our trips. In Costa Rica we partner with a community-based tourism organisation that preserves the traditions of the Maleku, one of the smallest Indigenous communities in the country.

"In the US, we want to

give travellers a more diverse and inclusive perspective of iconic places in the country. We've introduced tours that showcase the customs and history of Native American culture, like hiking the backcountry of Montana with a Blackfeet guide, and spending a day in South Dakota with a Lakota guide while enjoying a lunch of traditional food and visiting cultural centres."

### **Why is there so much racism directed against Indigenous**

### **people? How can travel companies help address this?**

"Racism against Indigenous people can stem from a lack of education – and the travel industry has a role to play in helping to educate our customers. Companies can start by making sure leaders and guides have cultural and anti-racism training so they can better recognise and respond to racism. Having a Reconciliation Action Plan can help companies work out

how they can make a genuine contribution to reconciliation and be a better and supportive partner of Indigenous people."

### **What are your goals for the coming years in regard to protecting and empowering Indigenous peoples?**

"We still have a long way to go when it comes to protecting and empowering Indigenous people. Looking ahead, we want to engage with more Indigenous suppliers and support First Nations tourism through a mentoring programme in Australia. We're in the process of developing and launching our next Reconciliation Action Plan and are also helping to establish a cross-industry advocacy group in partnership with Tourism Australia, that'll help to support reconciliation in tourism more broadly. It'll take the whole industry to make a real difference."

# META DESTINATIONS

A parallel universe is being built in the internet of the future. Although it won't replace Earth-bound travel, it is opening up opportunities for creative travel companies to engage with consumers.

# META DESTINATIONS

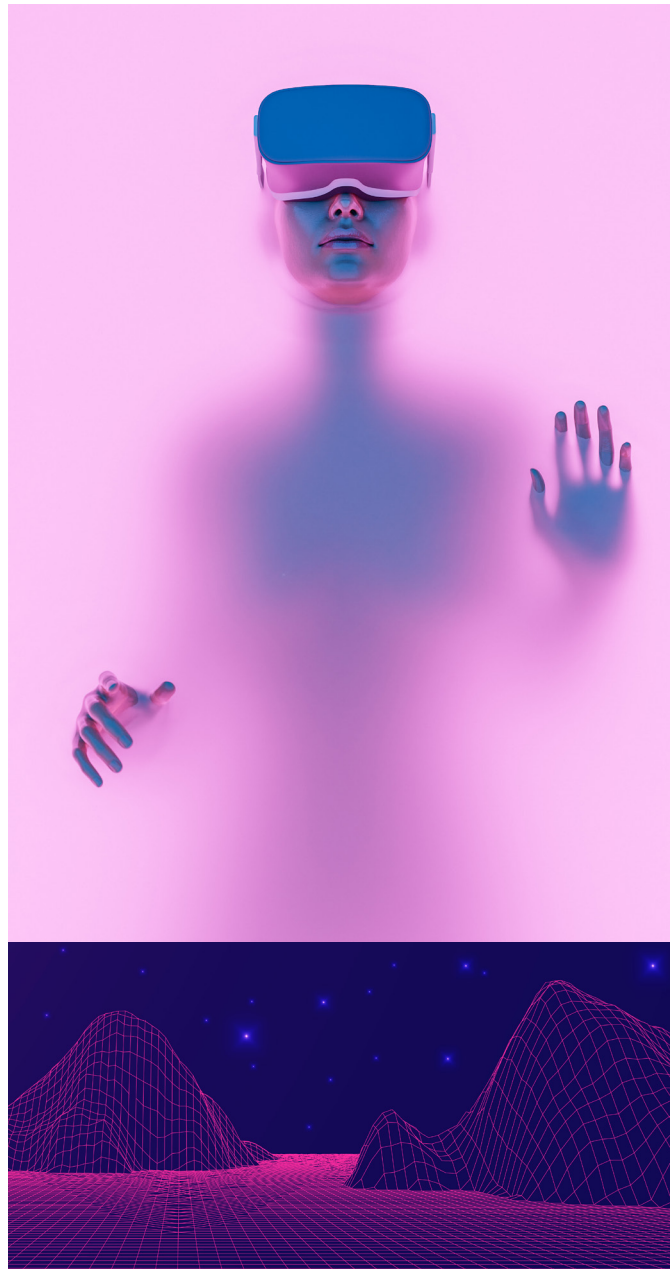
In November 2022, the European Commission's foreign aid department hosted a party in the metaverse with the goal of helping young people better understand what the EU does. Set on a virtual tropical island where weird loose-limbed avatars lurched around like dancing paper clips, the organisation said it was "the perfect place to get to know new people and reflect on global issues". Apparently, the event cost €387,000 to create – and only six people showed up. The question you have to ask is: "Does anyone care about the metaverse?"

2022 was a pretty bad year for Mark Zuckerberg's Meta – the tech company that owns Facebook, Instagram and WhatsApp. Just over a year after launching, Zuckerberg announced in December 2022 that he was laying off 11,000 people – 13% of Meta's workforce. Poor third-quarter results saw Meta's share price drop by 25%, wiping US\$80 billion off the company's value. Reality Labs, Meta's metaverse division, lost US\$3.7 billion in just three

months. According to *The Guardian*, "Meta has invested a staggering US\$100 billion on metaverse research and development, US\$15 billion in the past year alone – with apparently little to show for it."

All this said, Globetrender predicts that the metaverse is far from dead – in fact, we are only at the beginning of determining its optimal applications. According to Grand View Research Inc, the global metaverse market will be worth US\$679 billion by 2030 – to put that into perspective, the global market for luxury goods was estimated to be worth US\$243 billion in 2022 (according to Global Industry Analysts Inc). When it comes to travel, most people probably agree that virtual reality will never replace going on vacation, but there are interesting use cases for building Meta Destinations.

Taking the view that if you "build it and they will come", Celebrity Cruises unveiled the "Wonderverse" in



December 2022 where potential passengers can explore a hyper-realistic digital recreation of the company's newest ship – *Celebrity Beyond*. Described as a "ground-breaking industry-first", users can chat with an avatar of the company's CEO, as well as the captain of the ship, and get a virtual drink from the bar. Celebrity Cruises' chief marketing officer, Michael Scheiner, says: "We've revolutionised cruise ship design and now we're revolutionising where cruise ships are experienced. The Wonderverse allows us to unlock and bring to life the richness of the Celebrity experience in ways we can't do through traditional marketing and advertising."

Further evidence that the Meta Destinations trend is ready to take off in 2023 comes from the South Pacific island of Tuvalu, which recently drew attention to the fact that rising sea levels are threatening to drown it, by announcing that it is building a replica of itself

in the metaverse. Simon Kofe, Tuvalu's foreign minister, said: "As our land disappears, we have no choice but to become the world's first digital nation. Our land, our ocean, our culture are our most precious assets and to keep them safe from harm, no matter what happens in the physical world, we will move them to the cloud."

Announced in September 2022, Abu Dhabi's Yas Island Metaverse Initiative is the first project of its kind in the UAE. The idea is to recreate an "entire physical destination across multiple world-leading immersive 3D platforms" and allow visitors to "access the joys, wonders and attractions of Yas Island from home".

Oetker Collection, M Social and CitizenM are among a number of hotel brands that have also been dabbling with the metaverse. In the future, rather than performing a Google search, Meta Destinations will be the first port of call for customers preparing to book travel.

Adobe Stock

# GLOBETRENDER

# VOLT™

The logo for VOLT features the word "VOLT" in a bold, black, sans-serif font. The letter "O" is replaced by a complex graphic consisting of several overlapping, sharp, triangular shapes in various colors: magenta, red, yellow, cyan, and green. These shapes radiate from the center of the "O", creating a dynamic, multi-colored effect.

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# LIFE-HACKING RETREATS

As the desire for personal optimisation ramps up, travel will increasingly be undertaken as a transformative experience or gateway to betterment.



## LIFE-HACKING RETREATS

After the trauma of the pandemic (which is still ongoing in some parts of the world, such as China), most people have had to go through a process of recovery. Psychologists say there are three steps to achieving this: finding safety and stability, remembering and grieving, and restoring relationships. This final step is about personal empowerment, and for many individuals, 2023 will be the right time to put this into action.

Addressing this need, Life-Hacking Retreats will help consumers in their quest to become their "best self" and achieve their full potential. Part of the wider Transformation Economy, which sees people travelling to change themselves, this trend specifically relates to neatly packaged and curated group programmes that have certain objectives. Sometimes they are hosted at hotels and resorts but also in villas and private homes.

Last summer, Globetrender founder Jenny Southan spent five days at the Aerial BVI, a private island retreat in the British Virgin Islands. Owned by self-made millionaire, philanthropist and Christian missionary Britnie Turner, members of the public can pay to

other options include "Dream" (to identify your life's purpose) and Presence (a silent retreat to help participants gain clarity), for example. Itineraries typically comprise motivational speaker sessions, "white boarding" business ideas, meditation,

To help acolytes determine what they want to sign up for, website Queen of Retreats aggregates retreats from around the world according to the kind of experience people might want to have (couple's therapy, creative thinking, raw

Alternatively, they can join a Radical Sabbatical organised by Advivum Journeys in England. Meanwhile, the Heartbreak Hotel in the British Peak District welcomes women to its signature "Moving Beyond Betrayal" retreats. Over in France,

Over in Bhutan, luxury hotel brand Aman has designed a "Quest for Happiness" journey that invites guests to stay – and travel between – its five Amankora lodges that are scattered across the country. Available to book from December 1, 2022 to February 28, 2023, and May 1, 2023 to August 31, 2023, the trip takes place in a country that is consistently ranked as having the happiest people in the world.

But how does the Aman Life-Hacking Retreat help outsiders find contentment? Central to the Bhutan experience will be opportunities to "give back", something that Aman says allows guests to "receive blessings and become a blessing to others". Experiences include volunteering in an orphanage, teaching workshops for underprivileged children and cooking meals at the first-ever retirement home for Buddhist monks in the Himalayas.



attend themed "Elevate Summits" throughout the year that are designed to address different facets of their lives. Southan attended the "Abundance Summit", which was about how to generate wealth and use it as a force for good in the world but

equine therapy at the island ranch, and sharing revelations with the group at dinner. Up until now the retreats have been out of reach for most (priced at US\$10,000 all-inclusive) but in 2023, clients will be able to pay in instalments.

food detox and so on). Healing Holidays performs a similar function – for example, at Euphoria in Greece, people can attend an "emotional and physical" transformation retreat that includes dance therapy and self-awareness group sessions.

Mind Environment is hosting fast-track personal development retreats that help participants craft a "plan for better living in the world, so they can maximise their contribution to it". It also specialises in working with business leaders.

# MODERN FAMILY TRAVEL

In liberal countries around the world, increasing numbers of Millennials are redefining what parenthood looks like.



# MODERN FAMILY TRAVEL

When it comes to marketing family holidays, the large majority of travel companies present a nuclear version of family - mum, dad and a couple of kids diving into a swimming pool. However, the dynamics of caregiving have evolved hugely in the last few years, especially with the rise in LGBTQ+ Millennials having children. (In January 2023, the first nationwide census of its kind found that more than 1.3 million people in England and Wales now identify as lesbian, gay or bisexual.)



Lotte Jeffs, author of forthcoming non-fiction book *The Queer Parent: Everything You Need To Know From Gay To Ze*, says: "Travelling as a same-sex parent is very different to travelling as a same-sex couple - primarily because your child 'outs' you continually by referring to you as 'mummy and mama'. Before having children my partner and I had few concerns about travelling anywhere we wanted in the world but now we have to think far more carefully about the places we visit.

We have to be completely confident that we will have a positive welcome."

According to the Office for National Statistics (ONS), in 2019 there were 212,000 same-sex families in the UK, an increase of 40% since 2015. In 2021, one in six adoptions in the UK were made by same-sex couples, compared to one in 22 in 2011. From a global perspective, there is just as much diversity to take into consideration, and as increasing numbers

of countries enshrine the right for same-sex couples to get married in law (Switzerland, Slovenia and Chile are the latest countries to make same-sex marriages legal - and Andorra will in February, 2023), evermore will create their own Modern Families.

Modern Family Travel is something every operator, hotel, airline and travel agent needs to be sensitive to and make efforts to accommodate.

The stereotypes of what families look like have never been particularly accurate but now even less so. According to the ONS, in 2021, there were 19.3 million families in the UK, three million of which were headed up by lone parent families, and 90% of which were women. In the *Independent Family Review* published in autumn 2022 by England's Children's Commissioner, it was revealed that 44% of children born in the noughties didn't live with

both biological parents their entire childhood - a considerable change from 21% for children born in 1970. With this comes "blended families" with step-parents and step-siblings.

One company that stands out as making a concerted effort to change the way travel experiences are advertised - and delivered - is Celebrity Cruises, which launched its "All-Inclusive Photo Project" in spring 2022 with

top photographers such as Annie Leibovitz. The idea was to create a free open-source image library of diverse holidaymakers representing different genders, physical abilities, ethnicities, relationship preferences and family make-ups.

Sarah Richards, managing director of J Public Relations, says: "Families come in all shapes and sizes and travel brands are realising that catering exclusively to a 2.4 children couple is an increasingly archaic approach. Brands who portray an array of families and guest profiles in their marketing material are more likely to appeal to varying family types. Secondly, flexibility and a variety of accommodation types are increasingly important. Private villa offerings within hotels have seen a surge in popularity, especially with multi-generational families and mixed groups of families and friends. Travel companies that ensure that an inclusive, 'can-do' attitude is part of their DNA will be the winners."



**Choon Wah Wong,**  
co-head, Middle East,  
India, Europe and  
Americas, Shangri-La  
Group

### **What makes Shangri-La unique as a luxury hotel brand?**

"Our founder Robert Kuok believed Asian hospitality had something different to offer the world of travel. He believed that the Asian approach to hospitality – informal, heartfelt and genuine – was the bedrock of so many Asian cultures. Our service style, 'hospitality from the heart', has been the cornerstone of the Shangri-La experience and is now admired the world over."

### **What new Shangri-La openings are in the pipeline?**

"Today we operate over 100 hotels in over 76 destinations globally. We recently opened Shangri-La Jeddah in Saudi Arabia, marking our entry into the Kingdom and three properties in Mainland China – Shangri-La Nanning, Shangri-La Qiantan in Shanghai and

Shangri-La Shougang Park in Beijing. This year Shangri-La Phnom Penh will debut in Cambodia, our first property in the country. Also set to open this year is the group's first standalone lifestyle and entertainment precinct called the Palawan at Sentosa, on Sentosa Island, located off the coast of Singapore. The Palawan will include attractions such as HyperDrive, a gamified electric go-karting track and two beach clubs, with one specifically for families. In 2024, Shangri-La Melbourne will open its doors, marking the Group's third Shangri-La hotel in the country, alongside Shangri-La Sydney and Shangri-La the Marina, Cairns."

### **In what ways is Shangri-La an innovative brand?**

"Shangri-La has had a pioneering spirit from the very start. We were the first hotel group to put kettles in every

room, and the first to place note pads and pens by the side of every bed. We are in the process of reinventing the guest experience with a new design ethos that elevates timeless aesthetics. The four new hotels that recently opened in Shanghai, Beijing, Nanning and Jeddah are the first to showcase this reimagined vision and guest journey.

"Shangri-La's new design blueprint is built around three core design strategies which reflect our brand heritage while enhancing the guest experience. Firstly, Asian sensibilities will visually express the brand's strong cultural heritage and links to the region. Secondly, our hotels will be nature inspired reflecting local, natural environments and, thirdly, our hotels will have a spirit of place showcasing the history of each Shangri-La destination.

"Each element is applied to the new hotels' design schemes to create compelling visual cues that immerses guests in the Shangri-La brand and the hotels' location. A great example of this is Shangri-La Shougang Park in Beijing. Built on the original architectural foundation of a power plant, the hotel's design pairs Shougang's magnificent industrial and steel heritage with Shangri-La's aesthetics and sustainability concepts.

"Another example is our recently refurbished Island Shangri-La, Hong Kong by renowned interior designer, Tristan Auer. The hotel's newly renovated Grand Premier rooms, Horizon Club rooms and Cityview suite blend modern conveniences with Asian aesthetics and elegance, featuring sophisticated in-room technology and amenities. All the spacious rooms and suites open up to sweeping views

of the city, the Peak or Victoria Harbour, creating an exceptional accommodation experience with meticulous service for modern travellers and families. We continue to deliver and adapt to changing family structures and travel habits."

### **What will the reopening of international travel to and from China mean for Shangri-La?**

"There's no debating China was the world's largest outbound tourism market before Covid-19. We anticipate the Chinese travel market to bounce back quickly, in a similar fashion to how many other international markets did as they emerged from the pandemic. With over 50% of our portfolio in China and with over 50 years of experience in Asia, we are well prepared to cater to the Chinese traveller."

## Q&A: SHANGRI-LA

### How is family travel changing?

"Multi-generational travel, family travel to celebrate an occasion, as well as adventure and active holidays are growing in popularity. The definition of a modern family continues to evolve with single parenting making up 23% of families in the UK, and a growing number of parents now part of the LGBTQ+ community. In addition, many Millennials (Gen Y), have now become parents to Gen Alpha and are travelling the world with their children.

"To meet the needs of such a diverse audience and the desires for celebratory, joyous occasions spent as a family, Shangri-La has launched a family brand called 'Buds by Shangri-La'. Buds, an immersive and curated play space, allows children to learn through play in a creative, self-directed and experiential



environment. This is complemented by themed Family suites and Deluxe Family rooms, which include family concierge services, a tailored kids' meal programme, and a family pantry equipped with everything needed for a hassle-free stay. The new 'families only' beach club soon to open at the Palawan, Sentosa is another example."

### How are Shangri-La hotels adapting to the changing needs and desires of luxury travellers?

"Luxury is deeply personal. It is a moment in time where we truly

feel joy. It is different for each of us and we call it 'Shangri-La'. Whether it's a personal tour and five-course meal in the ancient ice caves of Whistler in Canada, or a wedding in a grand ballroom at Shangri-La Paris, the private residence of Prince Roland Bonaparte, we act as enablers to bring these personal moments of joy to life for our guests. This commitment of enabling heartfelt moments of joy underpins everything we do - from how we design our environments to how we deliver curated programming that truly feels personal."

### How important is social media to Shangri-La? How are you leveraging these platforms?

"Social media and platforms such as Instagram and We Chat are great visual mediums to showcase our hotels and resorts, particularly to younger travellers. A great example of how we're leveraging these platforms to showcase authentic content is through our social media champions.

"Many of our hotels have arranged photography, videography and social media training to enable colleagues to capture guests' moments

of joy. Shangri-La Dubai went one step further and created the Middle East's first 'Instagrammable room' in 2022, which features floor-to-ceiling windows looking onto the Burj Khalifa and downtown skyline, as well as a Polaroid camera, photo frames and flower arrangements."

### What do you predict for the future of luxury hospitality in 2023 and beyond?

"The desire to travel consciously will continue. Making an impact while visiting a destination is driving booking decisions,

with travellers wanting to travel where they can immerse in the culture, preserve natural environments and support the local economy.

"Across the Middle East, Europe, India, Indian Ocean and the Americas, we have partnered with Make-A-Wish International, a charity that grants wishes to children with critical illnesses. Guests staying in our hotels can book a 'Make A Wish Come True' package where proceeds are donated to the charity.

"The celebrations market for hotels such as Shangri-La the Shard, London is one of the largest leisure segments. Our teams are well versed in making a guest's vision for a special occasion become a reality, whether it be for a family member's milestone birthday, a wedding or a proposal."

# DRY-CATIONS

Abstention from alcohol among younger generations is inspiring a new era of sobriety-seeking travellers and booze-free hospitality.



# DRY-CATIONS



For many people, especially Westerners, going on holiday has been closely intertwined with the consumption of alcohol – a pint at the airport, a G&T on the plane, a welcome glass of bubbly at the hotel, a piña colada by the pool, not to mention a late-night whisky from the minibar. In many cultures, hospitality centres around booze, and there is often enormous social pressure to keep up with buying the rounds. However, there is a “vibe shift” taking place, driven by a far greater interest and understanding of health and wellness (we now have terms such as “mindful drinking”), as well as respect for people’s personal choices, and a general disregard of alcohol from Generation Z.

Some of the best evidence out there to support the emerging trend for Dry-Cations (or Sober Travel, if you prefer) comes from sales of no- and low-alcohol drinks. According to a report in *The Times* in January 2023, “Britain has emerged as one of the most dynamic places for sales of low- and no-alcohol drinks, with a sharp increase in new product launches and growth forecasts outstripping many other markets”.

Looking at data from drinks consultancy IWSR, no-alcohol volumes have jumped by 21% since 2018, well ahead of the 1% increase of the low-alcohol category. Based on IWSR’s analysis of ten key markets, including the UK, US, Australia, Canada and Germany, the market value of low- and no-alcohol products rose from US\$8 billion in 2018 to more than \$11 billion in 2022. New entrants to the British market include Guinness 0.0, which was launched in 2021, and the Athletic Brewing



Company, which was founded in the US in 2017.

Recognising that consumers want to feel more positive and in control of their consumption, especially on holiday when daily routines and healthy habits can quickly dissolve, Hyatt introduced a new “Zero Proof, Zero Judgment” beverage programme to more than a dozen of its US hotels at the end of 2021 (now there are in excess of 20). The initiative sees it partnering with Ritual Zero Proof, a brand that has devised a range of libations that are designed to taste like and function as substitutes for tequila, rum, whisky and gin. Apparently, the programme was inspired

by sober bar manager Anna Welker of Topside at the Revival Baltimore, who launched a zero-proof cocktail menu to ensure non-drinkers visiting the hotel, like herself, were met with “understanding and a variety of delicious beverage options”.

What’s particularly important to note is that just as many consumers don’t want alcohol, they don’t want to drink a lot of sugar either, or swig mocktails with childish flavours and colours. Whether someone is taking a Dry-Cation as a way of detoxing or because they don’t drink at all, the common

desire is to have access to sophisticated, elegant drinks that are made with quality ingredients and share many of the qualities of an alcoholic beverage. French Bloom, a de-alcoholised sparkling Chardonnay from France is very close to champagne, for example, while Three Spirit creates complex “spirits” using potent distillations of “mood enhancing” plants such as lion’s mane mushroom, yerba mate and guava leaf, which can be mixed with tonic and ginger ale or drunk neat on ice.

In 2021, a poll of 23,000 people by Branded

Research revealed that 29% of respondents said they planned to take an alcohol-free trip after the pandemic. Leading the way with delivering Dry-Cations is small group tour company We Love Lucid, which was founded by sober entrepreneur Lauren Burnison in 2019. Why is sober travel taking off as a trend? She says: “Sober travel is taking off because people are waking up to how much more of an epic time you can have without the booze. You can get up early, there are no hangovers, you have meaningful conversations and make meaningful connections.”



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# CARBON ANXIETY

Mounting public pressure to mitigate the climate crisis is forcing travel companies and airlines to invest in cutting-edge CO<sub>2</sub>-removal technology and reduction strategies.

# CARBON ANXIETY

Sustainability is one of the travel industry's hottest topics of conversation. But in Globetrender's 2022 *Travel Trend Forecast*, we identified the trend for "Eco Overload", which relates to how consumers are feeling increasingly burnt-out by the climate crisis and the rise in corporate greenwashing. In 2023, "Carbon Anxiety" will be the defining trend as companies realise that they are going to be held accountable for their environmental footprint and need to do something about it. The benefit of this collective pressure is that, although it may be uncomfortable, it is forcing problem-solving through innovation.

In December 2022, the Travel Corporation – a global travel company that encompasses 40 brands including Trafalgar, Insight Vacations, Contiki, Red Carnation Hotels and Uniworld – became the first global tour operator to have verified, science-based, net-zero targets. In order to reach net-zero



emissions by 2050, one of its initiatives is the launch of a carbon fund that puts money into decarbonising the business through reducing emissions and investing in "nature-based carbon removal solutions" via its nonprofit foundation, TreadRight. However, companies such as Intrepid Travel have been quietly leading the way for years – in fact, it has been the largest carbon neutral travel company since 2010.

For the aviation industry, there are two key areas

of focus: electric planes (coming later this decade) and SAF (sustainable aviation fuel), which is available now. At the end of last year, Globetrender visited a Neste biofuel refinery outside of Rotterdam, where old cooking oil and animal fat is turned into jet fuel. Shifting away from carbon offsetting, private jet charter company Victor is partnering with Neste to allow clients to invest in SAF as an alternative way of lowering the carbon impact of their flights. Although the SAF

isn't pumped directly into the customer's aircraft (transporting it from the Netherland's would put more pollution into the atmosphere), every drop that is purchased is put into an aircraft locally.

According to Neste, the overall carbon footprint of flights can be reduced by 80% through using SAF instead of fossil fuel, which is responsible for far more harmful emissions over its lifespan. The problem is, it's far more expensive at the moment. Jonathan Wood, vice-president

Europe, Renewable Aviation, at Neste, says that the partnership with Victor is "an industry-leading blueprint that we hope other companies will follow as the aviation sector strives for net-zero carbon emissions by 2050". He adds: "SAF is essential to reaching this goal, immediately reducing greenhouse gas emissions from flying." In December 2022, VistaJet announced an agreement with AEG Fuels to purchase SAF produced by OMV at Vienna International airport to

help it become carbon neutral by 2025.

An increasing number of commercial airlines are also investing in SAF – in fact many are pledging to use a 10% blend with conventional fuel by 2030 (although that doesn't sound like enough). At the end of last year, Virgin Atlantic said it would purchase 10 million US Gallons of SAF from Gevo Inc per year for seven years, with the fuel being delivered into Los Angeles or San Francisco airports. In this case, the biofuel is made from non-edible corn.

At around the same time, British Airways shifted some of the responsibility onto consumers by inviting them to purchase carbon removal credits through a new online platform called CO2llaborate. They can also use the website to buy sustainable aviation fuel, which is added to the existing fuel pipeline at Heathrow airport through a partnership with energy company Phillips 66.

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## Q&A: FLASH PACK

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**Radha Vyas, co-founder and CEO of Flash Pack**

### **What is Flash Pack?**

"Flash Pack specialises in small group adventures and experiences for like-minded solo travellers in their 30s and 40s. Each itinerary is tailor-made and meticulously researched to help shape a brag-worthy adventure trip and designed around group dynamics. The trips cut out the oversubscribed tourist trails by offering authentic activities and spontaneous experiences with locals. We have connections to unique and independent accommodation that show off the best of the destination, whether it's an exclusive island in the Arctic circle for the perfect northern lights views or camping in converted Land Rovers on the Serengeti."

### **Who is it targeting and why?**

"I was single, in my 30s, stressed at work and wanted to get away

and have some fun and adventure. All my friends were getting married, having kids or busy with their own respective careers. I had travelled solo most of my life but craved good company. A friend suggested I look at joining a group tour and this is the first time I had heard of this concept of group travel. I had always travelled alone or with friends.

"When I researched the market, I realised it was predominantly catering to young budget backpackers or the luxury, retired market. I was somewhere in between. I wanted a dynamic adventure with people my own age and a boutique hotel. There was no brand out there that appealed to me. I did end up going on a group tour to Cambodia and found myself with a group of people ten years younger than me. The tour didn't cater to my specific needs or interests. Flash Pack fills

this gap by targeting solo travellers in their 30s and 40s."

### **In what ways is it innovative?**

"Our innovation comes from being totally obsessed with group dynamics. We know travel has the ability to create deeper, faster friendships than anything else. Our mission is to create one million meaningful friendships through an uplifting and positive experience on every adventure.

"Behind the scenes, we've created a formula to deliver on our brand promise. We recently surveyed our repeat customers and know that 90% make four or more genuine friendships on our trips and 68% keep in touch every month, or even more frequently – which is a leading indicator that we are fulfilling our mission. Our NPS [net promoter score] is 78%."

### **What did you learn from going bankrupt during the pandemic? What are you doing differently in 2023?**

"In November 2021 we were able to re-launch Flash Pack 2.0 after receiving investment from PPF Group. Since then, we have put our hearts and souls into the revived company, with over 30 new, carefully curated global trips and a fresh team, fully focused on ensuring our product is up to the very highest standard for our customers.

"On average, we are now exceeding our targets by 20% each month, especially across the US, which represents 55% of Flashpackers. We've sent over 2,480 Flashpackers on our trips, to 202 adventures in 22 countries in 2022 alone. Our goal now is to stretch the boundaries of what is possible. Our dedicated team of in-house adventure innovation managers

will continue to scour the globe in search of unique, authentic activities; whether that's swimming with octopi in the kelp forests of South Africa, hiking the hidden backdoor route to Petra in Jordan, or sharing a meal with sumo wrestlers in Japan. We always ask: 'What great new experiences are coming up next? What haven't we thought of?'"

### **How will Millennials be travelling in 2023? What trends do you predict?**

"Millennials will be travelling less but travelling smarter. With growing concerns around climate change and the impact of flying, slower, more immersive travel is having its moment. We expect 2023 to be the year where people will start to travel more infrequently, but for longer periods of time. We launched two India trips back-to-back which were nearly four weeks

## Q&A: FLASH PACK

in total and it has been extremely popular. As interest in these long trips increases, we have built in two new trips for 2023 to North and South Italy to meet this demand.

"We are also seeing travellers taking more risks than ever before, despite the current economic climate. We have seen a huge surge in popularity to our Argentina trip, even though their annual inflation has spiked to 88%. As a result, we've put together new trips for Central and South America – starting by launching two new trips to visiting areas of Brazil and Argentina with departures starting in March 2023. We are seeing a similar trend with Sri Lanka. Despite the civil unrest that has rocked the country for the last year, it is now experiencing a comeback and has positioned itself as one of our top ten selling trips for 2022 – and we do not



expect interest to slow down any time soon."

### **What new tours are you launching in 2023? Will you be hosting trips to China?**

"Flash Pack launched four new LATAM trips in December – adventures that take Flashpackers to various different parts of Argentina, Brazil, Costa Rica and Rio. For 2023 we are also launching four new trips to Europe to destinations

such as Italy, Croatia and Slovenia and the Greek Islands. These trips will include unique activities that you aren't able to experience anywhere else including a Gladiator Training Experience on the Ancient Appian Way, test-driving a supercar at the Ferrari museum near Milan, a beach day on a secret cove on the Croatian coast and kayaking to the Temple of Poseidon in Athens.

"We don't have plans to launch in China until 2024. However, our trips in the Far East have been booming – especially to Japan where all six dates to see the cherry blossom in April have nearly all sold out. Other trips are still under construction but we plan to introduce a host of more risky adventures throughout the year."

### **How far ahead are people typically booking?**

"Most of our customers are booking holidays now and that's not because they are getting a discount, it's because of lack of availability. In fact – about 20% of our January bookings so far have been for December 2023. Waiting to book a holiday later in the year means that people have fewer options and might have to choose lower quality hotels at a much higher price point in destinations that aren't as exclusive."

### **What are you observing in terms of demand for sustainable travel?**

"As CEO, I personally oversee sustainability across our adventures. It's simply unacceptable not to be taking this seriously in 2023 and beyond, which is why we measure and offset the carbon on each trip so that the customer doesn't have to worry about it. We also use transparent carbon labels so the customer is fully aware of the carbon impact of each trip before booking. In 2023, we are working towards significantly reducing our carbon footprint."

"Whilst it's challenging to reduce flights in all the countries we operate in such as Argentina, we only work with local guides, partners and hotels to ensure that money goes to local communities – this is what our customers really care about. We aim to become carbon neutral by 2024."

# Take in the view, gain new perspectives

Globetrender, the UK's leading travel trend forecasting agency, is helping travel and tourism companies to navigate what's coming next through bespoke consultancy

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