GLOBAL TRAVEL & TOURISM WHITEPAPER 2023

Luxury travel post-pandemic

YouGov

GLOBAL TRAVEL & TOURISM WHITEPAPER 2023

Inside

Introduction

The travel industry, and especially the luxury segment, is continuing to bounce back with renewed energy in the wake of the pandemic. The pace is gathering for longer and bigger trips and new luxury travel priorities are emerging. As such, the concept of luxury is being redefined and consumers are seeking more meaningful, purposeful travel experiences during their trips. Affluent travelers are after unique and memorable travel experiences, that are one of a kind, and create lasting impressions. They are also approaching travel in a more conscious and sustainable way.

This YouGov report sets out to get under the skin of high-end travel, to understand what luxury travel looks like post-pandemic, explore what luxury travel experiences consumers and affluent consumers* are seeking, what they are prepared to pay for, what they aspire to, and ultimately, what their future luxury travel experience would be. Using recent YouGov data across 18 international markets, our research focuses on the attitudes and behavior of affluent consumers, particularly the affluent under 35s – the audience that will shape the luxury travel industry of the future.

This report will also help marketers and travel companies gain a better understanding of luxury travel audiences. Please note, our survey samples in East Asian markets such as China, Hong Kong, and Singapore, as well as India are not all nationally representative (with some being representative of the online or urban population; see methodology for details).

*Affluent consumers defined as Higher income: Higher than 200% of the median (based on household income)

▶ LEARN MORE ABOUT OUR DATA

Key insights

Travel wanderlust is back with a vengeance!
The appetite for travel is rising. Our research shows that global consumers are spending more on travel, booking longer trips, taking more vacations than before, traveling with wider groups, and ticking more locations off the bucket list.

Affluents' passion for travel runs high
While there is a clear desire among the global population to travel more, this appetite is higher among affluent consumers, and specifically as the next generation of luxury travelers, younger affluents.

Bleisure travel continues to be popular
Flexible working arrangements – fueled by the pandemic – have created opportunities for the rise in blended trips across the globe, a freedom utilized more among affluents and younger affluents alike.

Acceleration in health and wellness
We have seen the acceleration of health and wellness travel with affluent consumers seeking to rejuvenate their mind and body, and stay in health and wellness retreats.

Sustainability will remain an important consideration
Conscious travel is high on the luxury list be it staying in eco luxury accommodation or aligning with travel brands that support local communities and protect the planet.

Creating more meaningful experiences
Luxury travelers are after a unique and memorable experience that is authentic. Seeking experiences to impact who they are and provide personal fulfilment and enrichment.

The personal touch
Whilst the luxury traveler is multifaceted, personalization is at the heart of luxury experiences. Providing a personal, exclusive, unique service that caters to individual dreams and desires whilst offering impeccable service provides the perfect blend of the ultimate luxury travel experience.

Above and beyond
Affluent consumers are prepared to pay a higher price for travel, and top end, quality experiences that go above and beyond.

Safety is paramount
Safe travel remains a key priority for future travel, it will be important for destinations and hotels to reassure travelers that their safety is of primary concern.

PART - 1

Post-pandemic travel globally

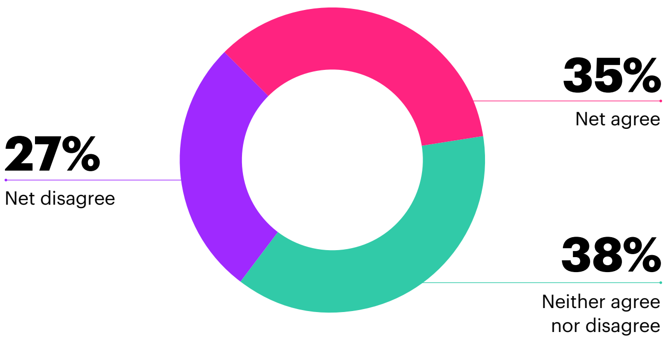
The desire to travel is more evident post pandemic

New YouGov research reveals that the pandemic has fueled the appetite for travel across the globe. More than a third of respondents state that travel has become more important to them since the pandemic (**35%**) compared to only a quarter who disagree with the statement (**27%**).

In fact, YouGov data reveals that almost three quarters (**67%**) of consumers are planning a leisure trip in the next 12 months (**56%** domestic and/or **26%** international) and more than a quarter (**27%**) are planning on taking 3 or more trips in the next 12 months (for leisure, business or personal reasons). *(Global Travel Profiles data, January 2023)*

Level of agreement with the statement 'Travel has become more important since the pandemic'

Global



Q: How much do you agree or disagree with the statement 'Travel has become more important to me since the pandemic'

Net agreement (Strongly agree/slightly agree), Net disagreement (Slightly disagree/Strongly disagree)

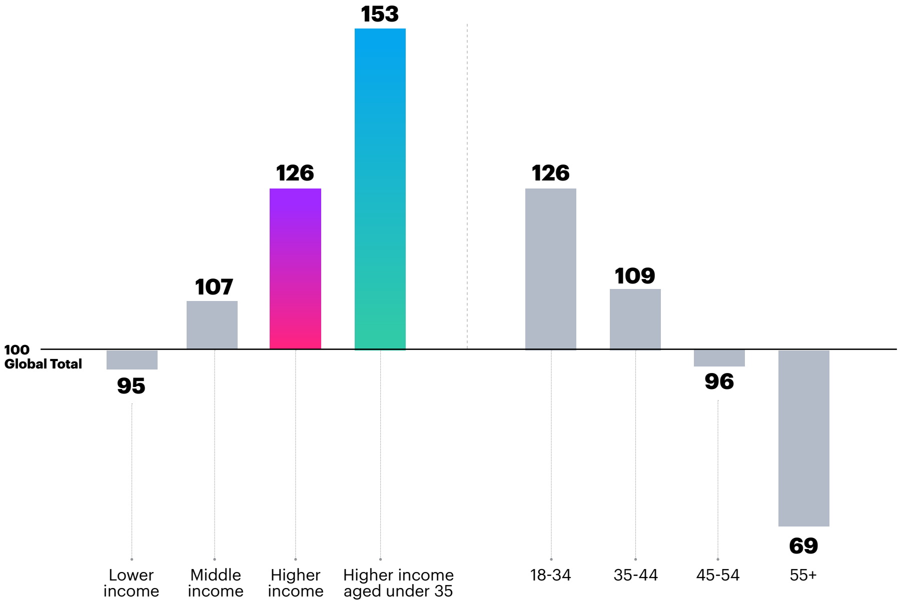
▶ **SPEAK TO A RESEARCHER**

Travel gains greater importance amongst affluent and younger consumers

Global consumers in higher income groups place higher importance on travel since the pandemic compared to lower income groups. A higher proportion of high-income earners agree (strongly/slightly agree) with the statement, *'Travel has become more important to me since the pandemic'* (**44%**), than the overall global population (**35%**). This is **+26%** above the global average. In addition, those aged 18-34, are also more likely to agree with the statement compared to older age groups. And if we isolate high income groups aged 18-34 agreement levels increase to more than half (**54%**), pushing their index score further. Understanding the travel behavior of these distinct groups will be a key area of focus within this report.

Index of those agreeing (strongly/slightly agree) with the statement 'Travel has become more important since the pandemic'

Global by income and age



Q: To what extent do you agree with the following statement regarding travel? 'Travel has become more important to me since the pandemic'

Note

Income definitions

Lower income
Less than 75% of the median

Middle income
between 75% and 200% of the median

Higher income
higher than 200% of the median

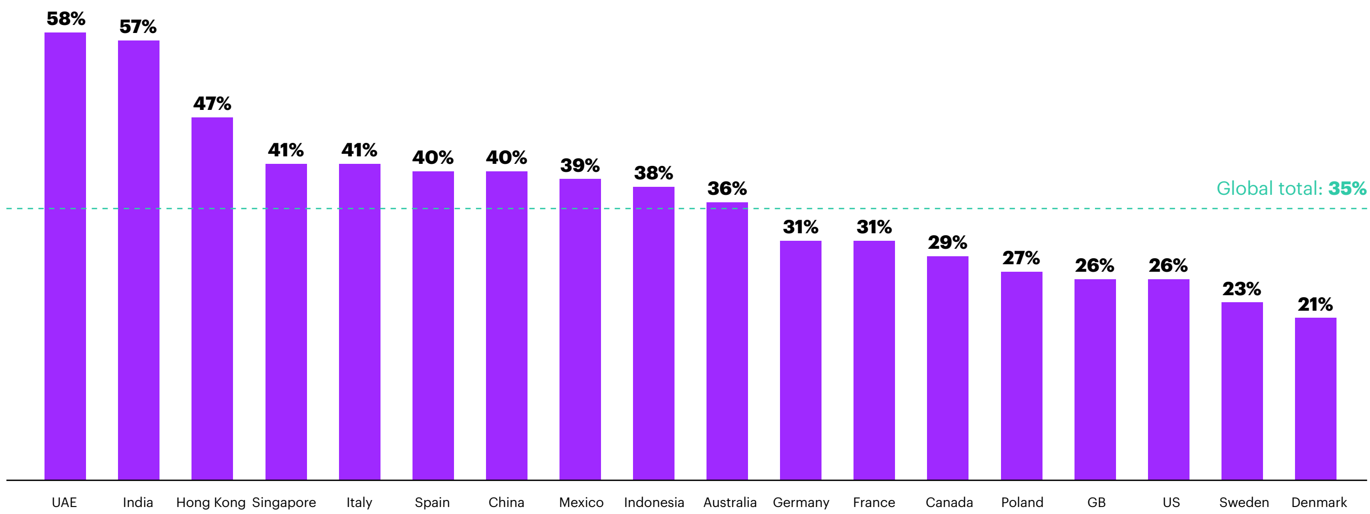
▶ LEARN MORE ABOUT OUR DATA

UAE ranks top for travel being of high importance

Comparing the data by country, UAE consumers have a greater appreciation for travel since the pandemic, ranking the highest out of the 18 countries researched for agreement with the statement 'Travel has become more important since the pandemic' (**58% agree**). India follows closely with an almost equal proportion agreeing (**57%**). All APAC countries over index on attaching greater importance to travel, whilst all European markets (with the exception of Italy), register lower levels of agreement than the global average.

Net agreement (strongly/slightly agree) with the statement 'Travel has become more important since the pandemic'

By country



Q: To what extent do you agree with the following statement regarding travel? 'Travel has become more important to me since the pandemic'

Discover living data | **Speak to sales** | **Run a survey**

With a significant proportion of global consumers experiencing pent up demand for travel, how has the pandemic accelerated shifts in consumer vacation preference and what does this mean for luxury travel?

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Travel is back with a bang!

In the last 12 months, consumers across the globe strived to make up for lost time, spending more on vacations, and catching up on the time missed with their loved ones through traveling with wider groups of friends and family. They also had a desire to fulfil their travel dreams by ticking a location, or experience off their bucket list, taking more vacations, and longer vacations than ever before.

Additional changes in travel activities in the last 12 months centred on the mode of travel such as, taking a cruise or a luxury rail trip.

▶ EXPLORE MORE DATA

Changes to travel activities in the last 12 months, since the pandemic

Global

1st	13%	Spent more money on vacations
1st	13%	Traveled with a wider group of family/friends
3rd	11%	Ticked a location/ experience off my bucket list
4th	10%	Taken a longer vacation than usual
5th	9%	Taken/booked more vacations than usual
6th	8%	Worked remotely whilst on vacation
7th	7%	Took a business trip
8th	6%	Stayed at a health and wellness retreat
9th	5%	Used a travel expert
9th	5%	Taken a cruise
9th	5%	Taken a vacation as an extension of a business trip
12th	4%	Moved to a different country to live/work for an extended period
12th	4%	Purchased a holiday/vacation home
14th	3%	Took a luxury rail trip

Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

Work or play?

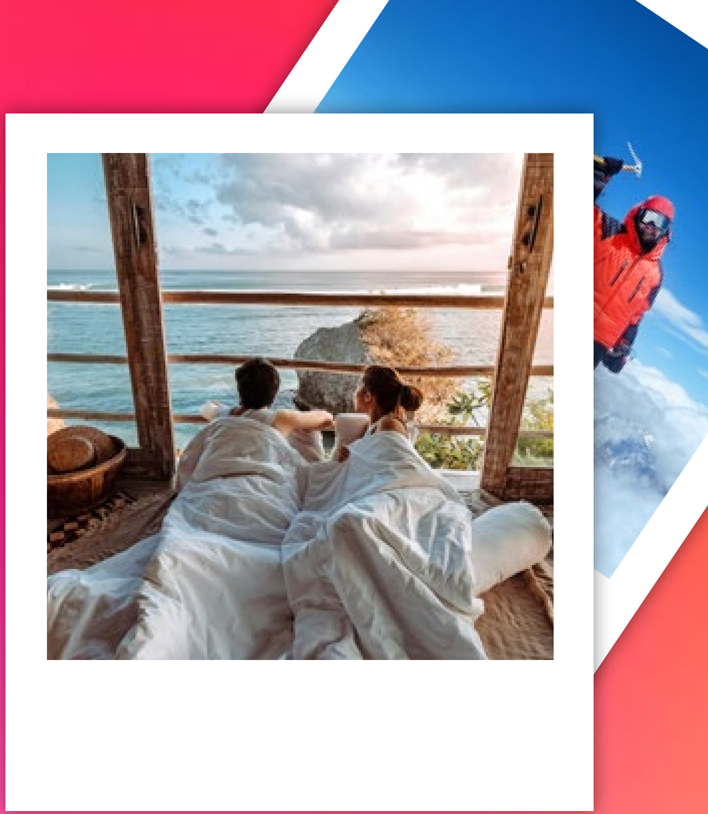
Working from home and hybrid working has become the norm for many, it's provided increased flexibility for people to work anytime or anywhere. As such, bleisure (or workation) travel has become a pandemic-fueled trend that looks here to stay. Global consumers working remotely whilst on vacation, taking a vacation as an extension of a business trip or even opting to move to a different country to live/work for an extended period have become an attractive travel audience group for destinations and travel companies alike. In addition, the ability to vacation as and when you want, may have driven the appetite for the purchase of second vacation homes in the last 12 months. Comparing the data by countries, the appetite for mixing work with leisure and workations (working remotely whilst on vacation) is stronger in the UAE (**18%**), India and Mexico (**17%**) and Indonesia (**15%**), and less pronounced in the European markets (GB **4%**, France and Germany both **3%**).

Mind and body

Another notable change in travel activities has been the acceleration in desire to stay at a health and wellness retreat. Vacations provide an opportunity to switch off and unwind from the stresses and challenges of everyday life and now more than ever, consumers want to truly relax, unwind, and look after themselves and their physical health through wellness vacations.

Focus on affluents

Identified as a key target for luxury travel, we shine a light on this highly desirable affluent segment to gain a deeper understanding of who they are, their travel behavior, attitude to travel and most importantly their luxury travel expectations and aspirations.



Who are they?

Demographically, affluents skew slightly male (57%) and slightly older than the global total, almost seven in ten (68%) are aged over 35 with 45% aged 45+. They are more likely to be graduates (65% vs 46% global total) and more than eight in ten are working (82% vs 62% global total) with almost three quarters working full time (72% vs 48% global total).

57%
vs. 51%
global total

43%
vs. 49%
global total

65%
vs. 46%
global total

82%
vs. 62%
global total

75%
are passionate about traveling
vs. 64% global total

52%
consider travel and vacations their #1 topic of interest
vs. 42% global total

38%
plan to take 3+ trips in the next 12 months
vs. 28% global total

50%
plan to take an international trip for business or leisure in the next 12 months
vs. 26% global total

Travel is integral to their lives

Playing a key role in their lives, they are not only passionate about traveling but travel and vacations ranks as their top general topic of interest ahead of personal finance. Their enthusiasm is reflected in planning on taking more trips than average in the next 12 months. Their future travel spans both business and leisure (or a blend of both) and they have a higher propensity to be taking both domestic and international trips in the next year. They are twice as likely as the global total to be hopping overseas and taking an international trip.

Planning their trips

As avid travelers, they enjoy researching and planning their vacations, and as such have at least one destination in their mind or already selected for their next vacation. While they are happy to organise and book their vacation themselves, they are more open to expert advice and the convenience of letting someone else curate their itinerary or offer them something unique and personalized that is off the beaten track.

72%
enjoy researching and coming up with a plan for their vacations
vs. 57% global total

70%
have at least one destination in mind when planning for their next vacation
vs. 57% global total

13%
use a fully customized bespoke service to organize vacations
vs. 9% global total

61%
like to go off the beaten track when on vacation
vs. 55% global total

Safari and wildlife
15%
vs. 8% global total

Winter sports
11%
vs. 6% global total

Multi-centered
20%
vs. 11% global total

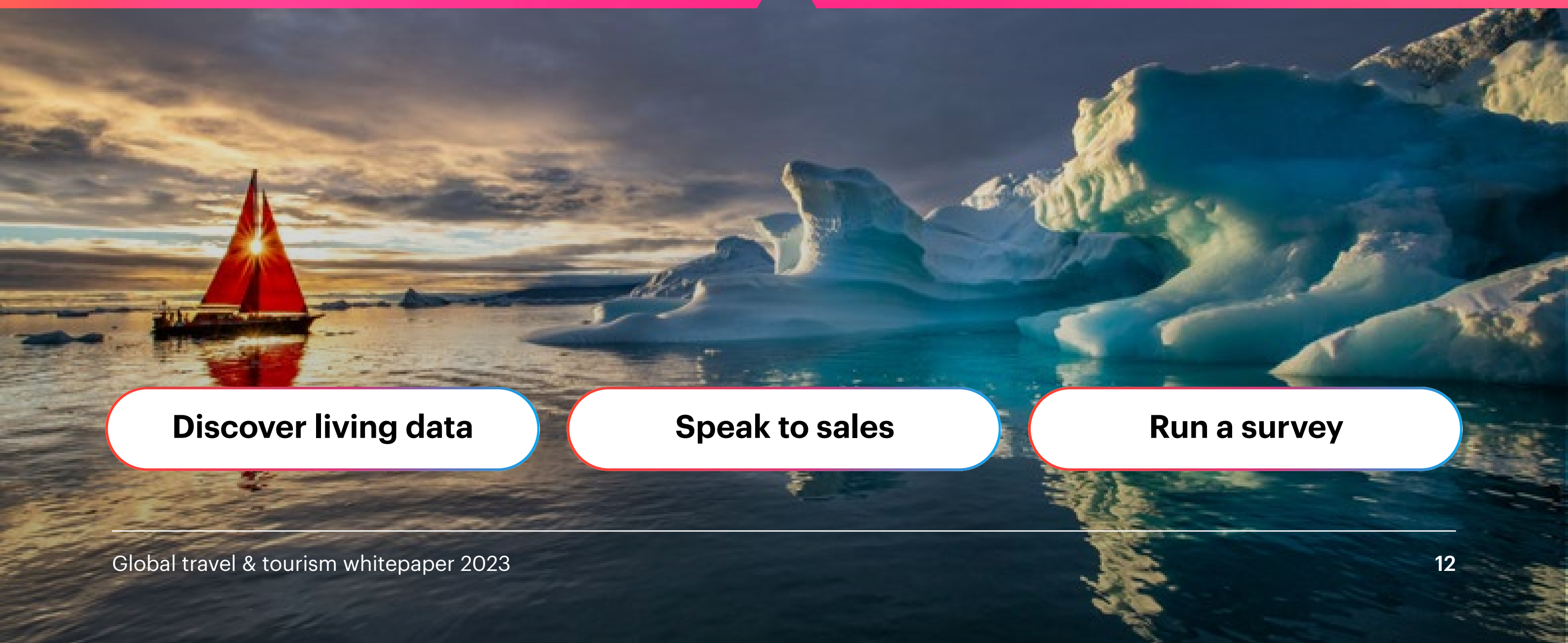
Activities/ sport
7%
vs. 4% global total

Cruise/sailing
12% vs. 7% global total

Types of vacations they have taken in the last 12 months

With a thirst for travel they embrace all manner of different types of vacations be it on the beach, a city break or a combination of relaxing and sightseeing/activity vacations. They differ from the masses and over index by +50% or more in taking: safari and wildlife trips, winter sports vacations, multi-centred vacations, activities/sports vacations and equal proportions enjoy taking to the sea either on a cruise liner or a sailing/boat vacation.

Source: YouGov Global Travel Profiles, January 2023.



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Run a survey

PART - 2

The changing face of luxury travel

Delving into our affluent segment (whom we have already seen place a higher level of importance on travel generally and particularly since the pandemic), how do their travel activities in the last 12 months compare to the global average? What inspires them? And what makes the affluent traveler stand out?

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Speak to sales

Run a survey

Affluents flying high

In the last 12 months, affluents and younger affluents are considerably more likely to have undertaken business-related travel, taken longer vacations than usual, and splurged more on travel. In fact, when comparing their travel behavior to the global total, they over index for all travel activities and are more engaged in all aspects of travel, be it business, or leisure.

Mixing business with pleasure

Affluent and affluents aged 18-34 are more than twice as likely as the global average to have taken a business trip in the last 12 months, and almost double the amount have taken a vacation as an extension to a business trip - combining business and leisure.

They over index on working remotely whilst on vacation, and some resorts have created package stays with office and study spaces to cater for those who want to combine travel with their daily routine, whereas various destinations across the Caribbean, LATAM, Europe, and APAC have created special remote work visas to help attract those keen to stay longer and experience the destination as a local.

Valuing travel experts

Global affluent consumers prefer to pay to have all their travel arrangements and itineraries organized for them. They are **+57%** more likely than the global average to have used a travel expert to book their vacation in the last 12 months, increasing to **+106%** among affluent consumers aged 18-34. Travel advisors can offer curated itineraries, convenience, reassurance, knowledge, and support to enhance a trip as well as tailor-make a vacation to an individual's own unique preferences. Exclusivity, bespoke packages, and travel experiences which are typically not available through mainstream travel sites or booking platforms have helped luxury specialists to carve out a niche in this buoyant market.

Enrichment

Wealthy consumers also have a higher propensity to seek vacation experiences above and beyond the normal such as staying in health and wellness retreats and purchasing a vacation home that can be used as and when they desire to take a trip and continue their vacation experience at their convenience. Moreover, they are more likely to seek the fulfilment and enrichment of traveling with wider groups of people, ticking a location or experience off their bucket list, or moving to a different country to experience cultural enrichment.

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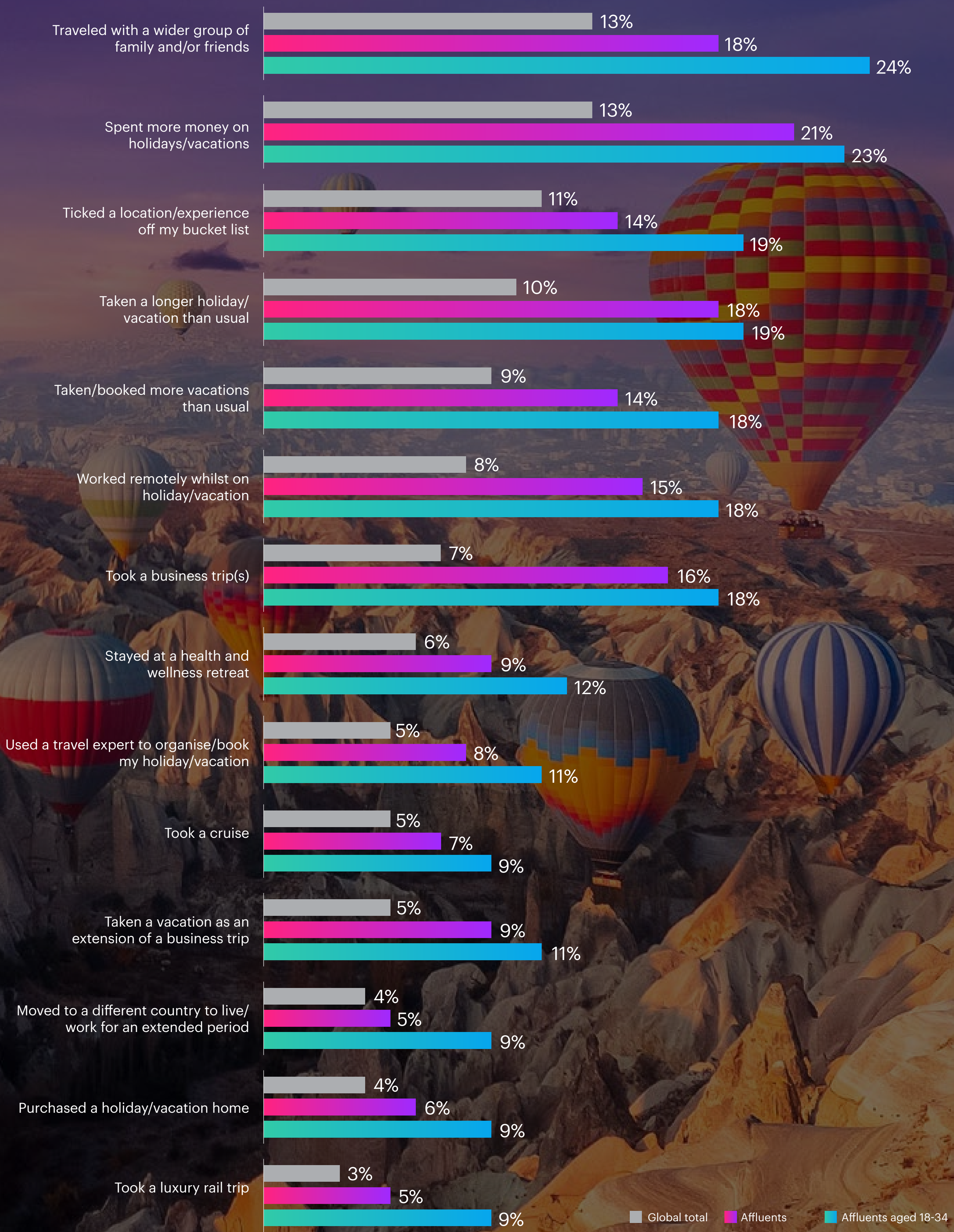
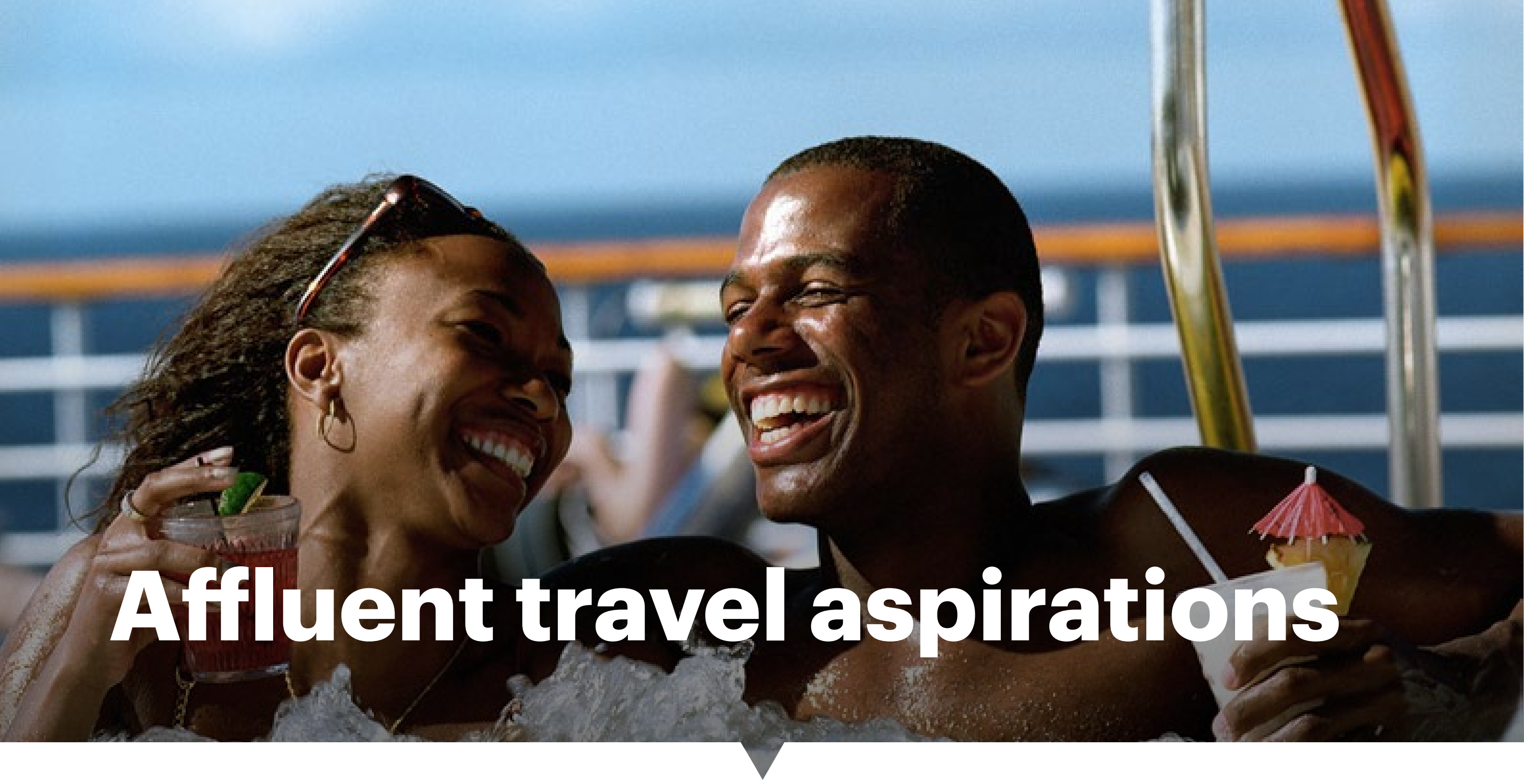
Travel activities in the last 12 months amongst global total and affluents



Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

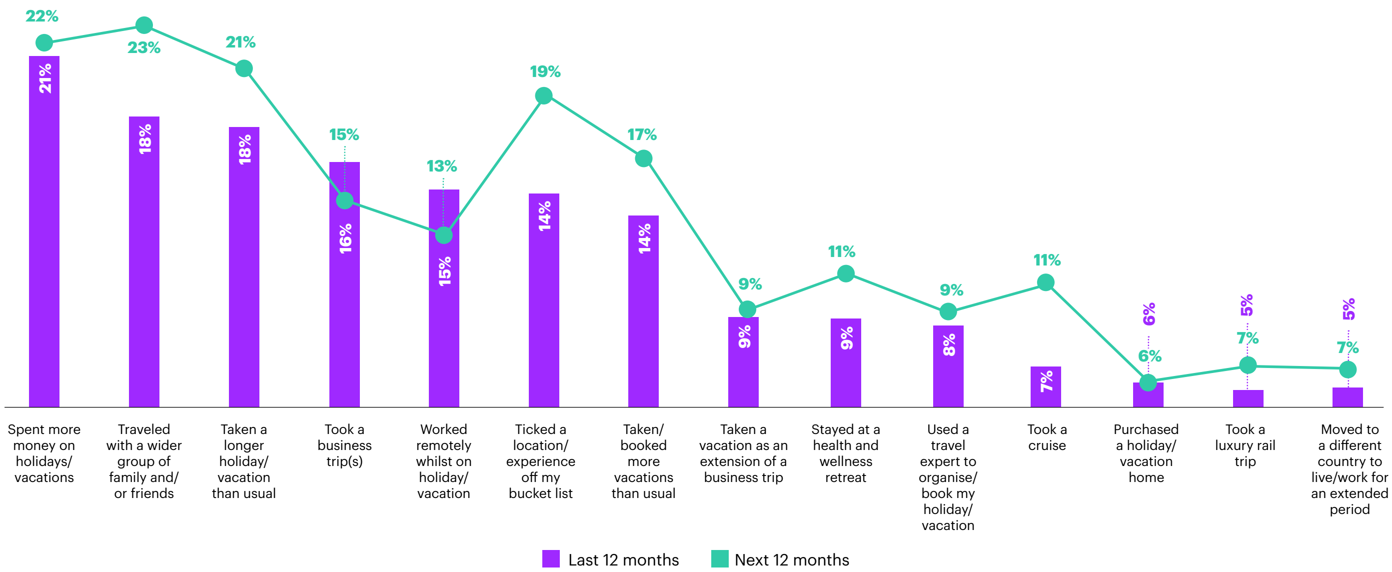


Affluent travel aspirations

Exploring how affluent travel activities might evolve in the next 12 months, we see the expectation to spend more on vacations is still a high travel priority for affluents compared to last year, along with taking longer vacations than usual. However, the desire to travel with a wider group intensifies with a higher proportion wanting to share their travel experiences with family or friends in the next 12 months, ranking it as the top future travel activity. Additionally, the appetite for bucket list experiences strengthens with affluent consumers expressing a yearning for widening their travel adventures with new experiences, or more exotic locations. The allure of cruising increases in interest amongst affluents, with more intending to take to the sea in the next year. And experiential travel is also likely to rise in the next 12 months, with a higher proportion of affluent consumers planning to stay in a health and wellness retreat.

Comparison of travel activities undertaken in the last 12 months and the next 12 months among affluent consumers

Global



Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

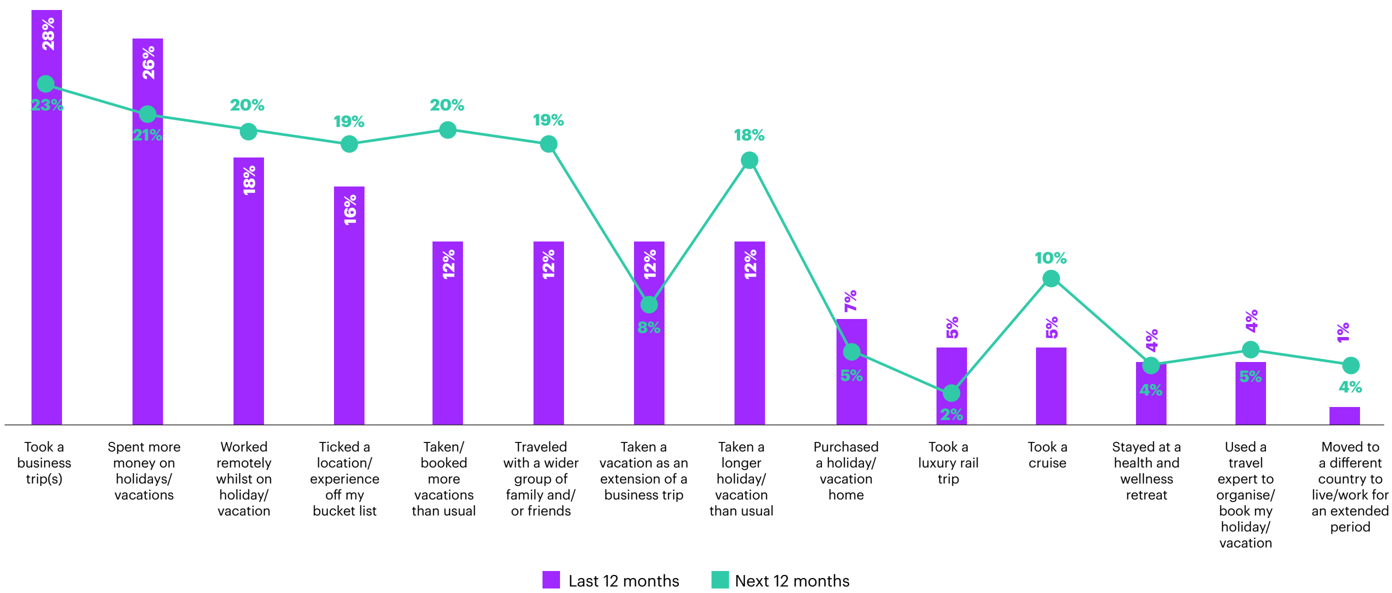
Q: Which of the following travel related activities are you likely to do in the next 12 months?

Spotlight on travel in different markets amongst affluents

Americans planning more trips and longer stays
Concentrating on American affluents alongside the travel activities they have undertaken in the last 12 months and the ones they are planning on doing in the next year, business travel ranked as the top activity last year, but fewer business trips are planned for the next 12 months. While spending more on travel still ranks as the second most popular travel activity for both last year and in the future, fewer are planning on spending more in the next 12 months. In contrast, there is a considerable uplift for US affluents to take more vacations than usual, travel with a wider group of family and friends and take longer vacations. Doubling intention to take a cruise in the next 12 months also indicates the returning confidence and appetite for cruising.

Comparison of travel activities undertaken in the last 12 months and the next 12 months among affluent consumers

United States



Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

Q: Which of the following travel related activities are you likely to do in the next 12 months?

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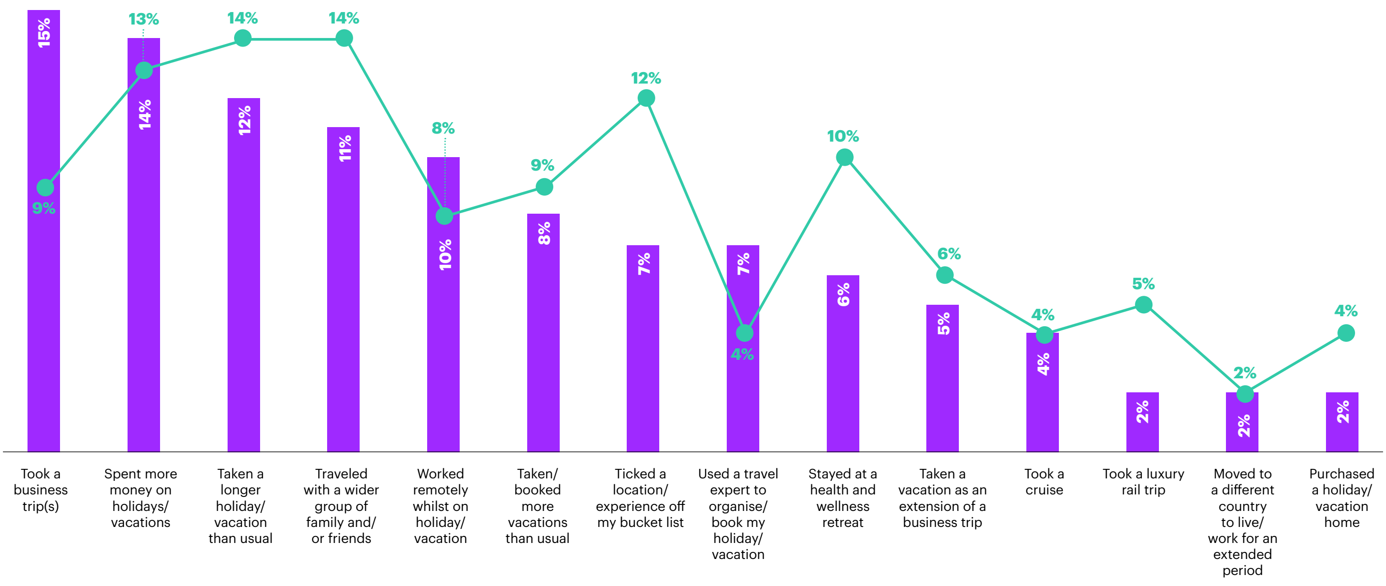
Danes seeking more enrichment

Amongst Danish affluents, spending more on vacations will still be a core focus in the next 12 months but they are intending to take fewer business trips. Making up for lost time, a higher proportion plan to tick a location/experience off their bucket list, travel with a wider group of people and stay at a health and wellness retreat. Their future travel aspirations have a renewed focus on personal fulfilment and enrichment travel activities.

Comparison of travel activities undertaken in the last 12 months and the next 12 months among affluent consumers

Denmark



Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

Q: Which of the following travel related activities are you likely to do in the next 12 months?

Australians want to spend more on travel

Almost a quarter (**23%**) of affluent Australians spent more on travel in the last year and three in ten intend to spend more on vacations in the forthcoming 12 months. Whilst it continues to be the top travel activity year on year and experiences a strong **+7%** uplift, traveling with a wider group of friends and/or family sees the largest increase from the previous year. Another travel activity that affluent Australians are planning on undertaking to a greater extent in the next 12 months is taking a cruise (**+6%**pts).

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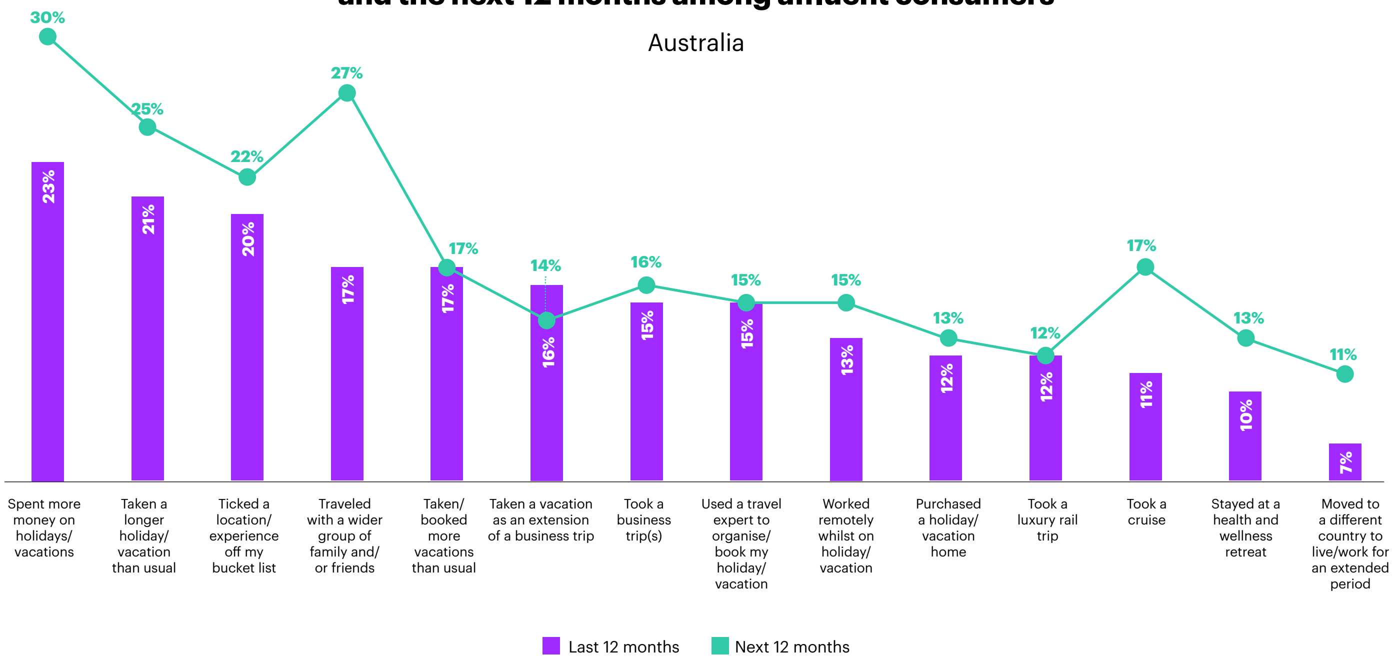
Comparison of travel activities undertaken in the last 12 months and the next 12 months among affluent consumers



Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

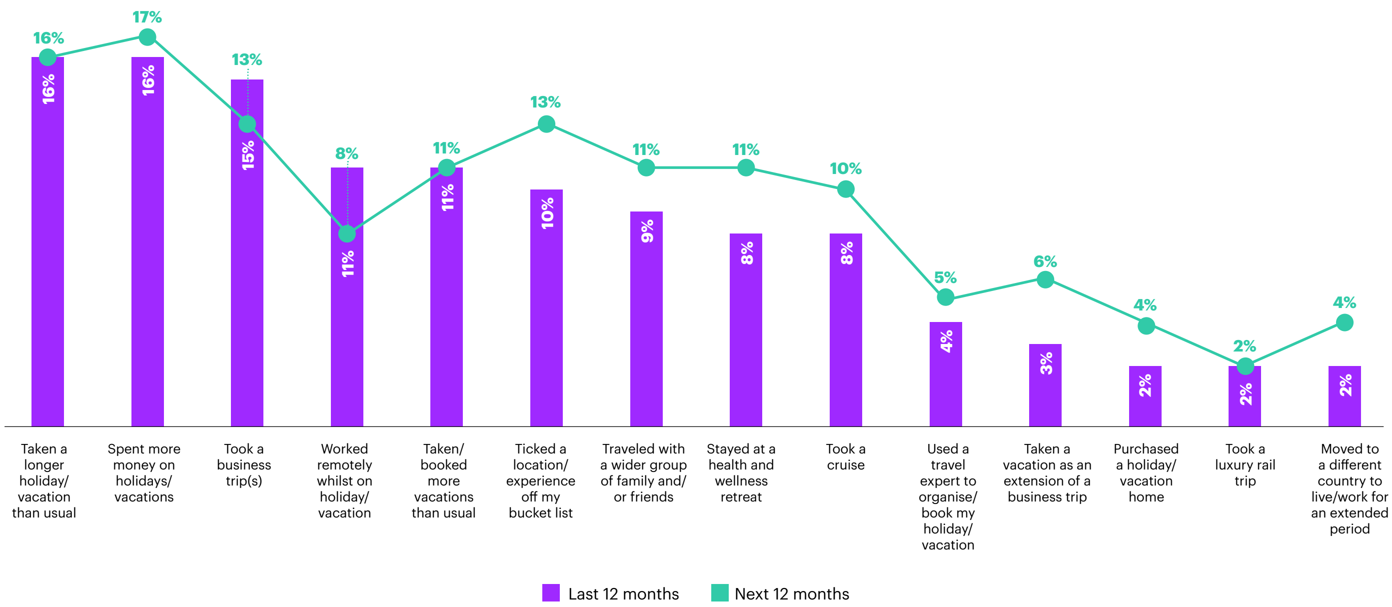
Q: Which of the following travel related activities are you likely to do in the next 12 months?

Less business and more pleasure for Swedes

In Sweden, we note slightly less variation year-on-year in travel activities, with future behavior for affluents very similar to the past, suggesting travel activities are stabilizing. Leisure takes precedence over business trips, with the intention to spend more and taking longer trips as the top areas of focus. Slightly fewer business trips (**13%** in the next 12 months vs **15%** last 12 months) and plans to work whilst on vacation are intended in the next 12 months (**8%** in the next 12 months vs **11%** in the last 12 months). Swedes are predicting marginally more bucket list experiences and health and wellness retreats.

Comparison of travel activities undertaken in the last 12 months and the next 12 months among affluent consumers

Sweden



Q: Thinking about how things have changed since the pandemic, which of the following travel related activities have you done in the last 12 months?

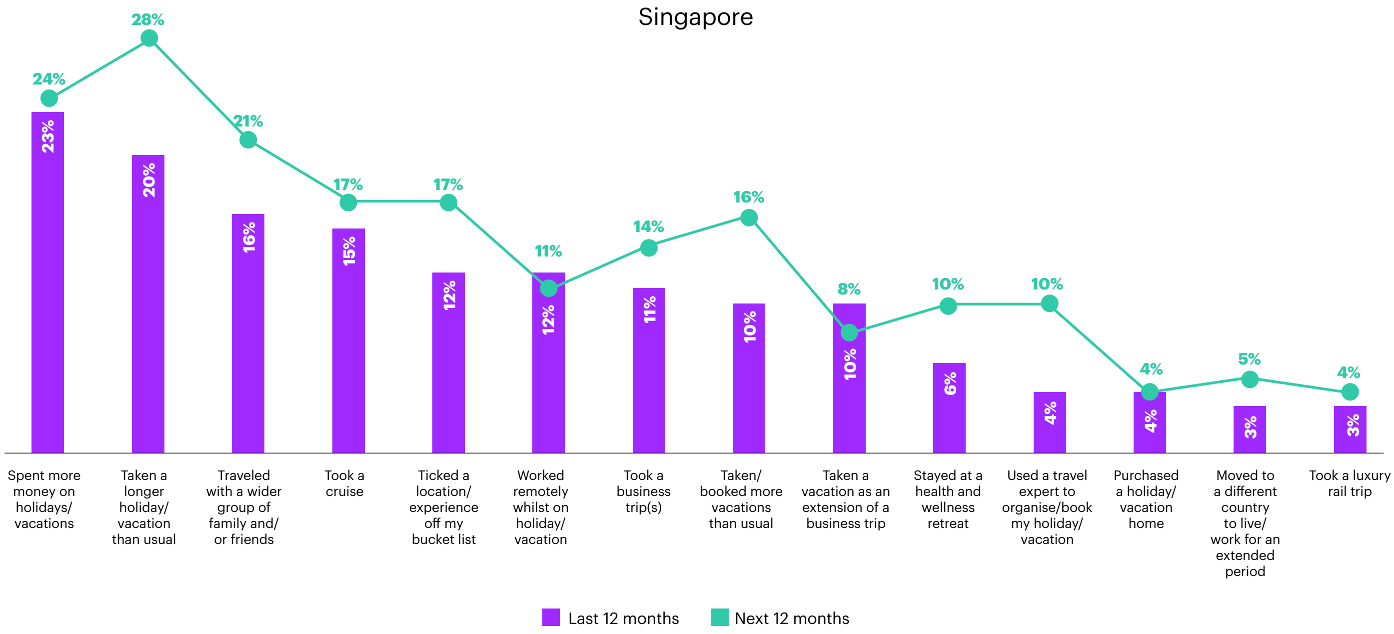
Q: Which of the following travel related activities are you likely to do in the next 12 months?

Longer vacations for Singaporeans

More than a quarter (**28%**) of affluent Singaporeans intend to take longer vacations in the next 12 months compared to a fifth (**20%**) in the last 12 months. Taking longer trips jumps up to be their top future travel activity. Spending more on vacations continues to be important, along with traveling with a wider group of family and friends. Other activities they intend to do more of in the future include booking more trips, ticking a location off their bucket list, and using travel experts. Whilst only one in ten (**10%**) affluent Singaporeans intend to use a travel expert in the next 12 months, this is double the amount from the previous year.

▶ **EXPLORE MORE DATA**

Comparison of travel activities undertaken in the last 12 months and the next 12 months among affluent consumers



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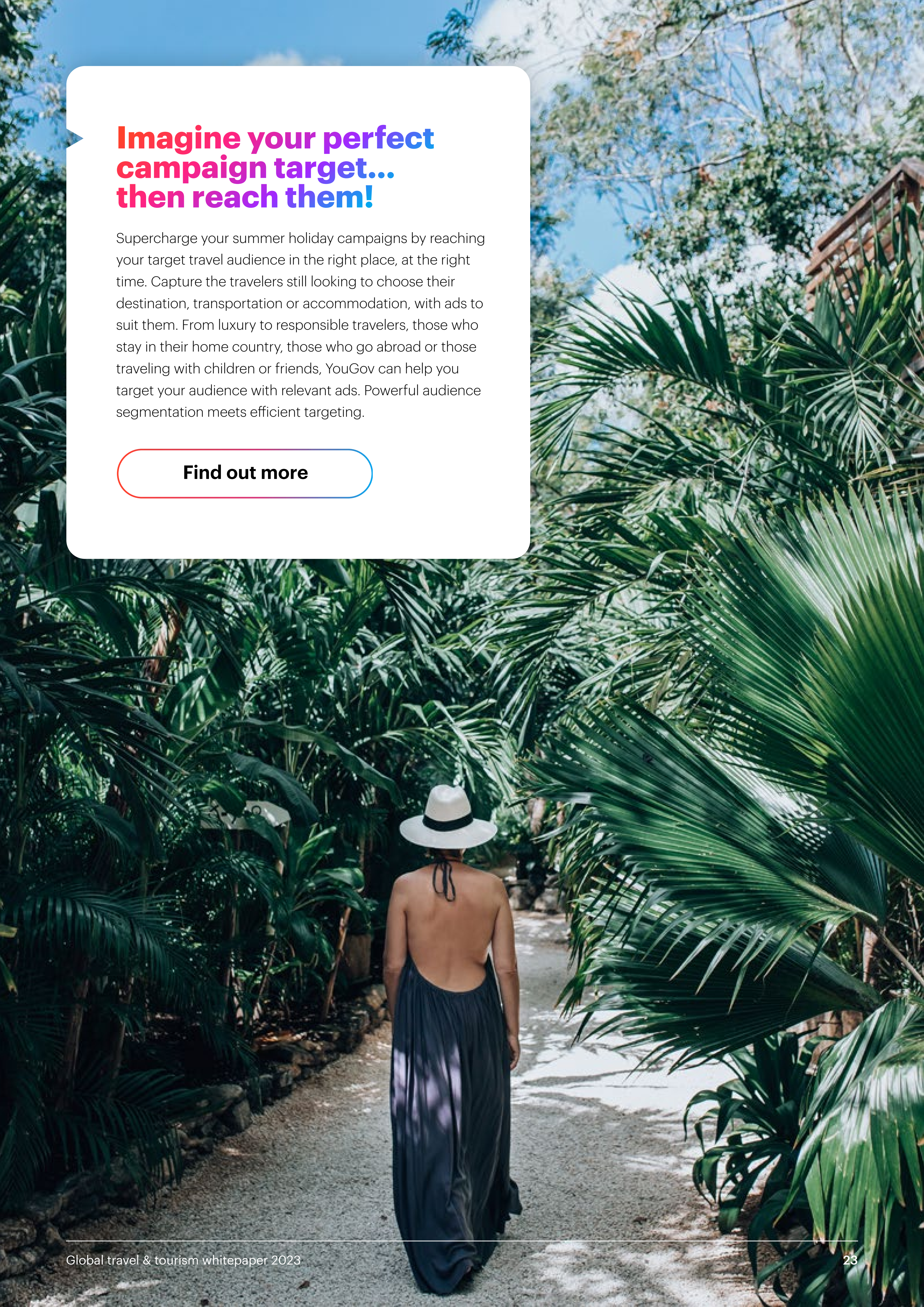
Q: Which of the following travel related activities are you likely to do in the next 12 months?



Imagine your perfect campaign target... then reach them!

Supercharge your summer holiday campaigns by reaching your target travel audience in the right place, at the right time. Capture the travelers still looking to choose their destination, transportation or accommodation, with ads to suit them. From luxury to responsible travelers, those who stay in their home country, those who go abroad or those traveling with children or friends, YouGov can help you target your audience with relevant ads. Powerful audience segmentation meets efficient targeting.

Find out more

PART - 3

Focus on luxury travel experiences

For global consumers seeking a luxury travel experience, they want their dreams to become a reality, seek something unique, exclusive, private, indulgent, and meaningful be it for adventure or relaxation. Our research explores which luxury products/services and experiences global consumers and affluent groups have engaged with as well as the ones they are prepared to pay for to ensure the ultimate luxury experience.

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Run a survey

Eco luxury accommodation has high appeal

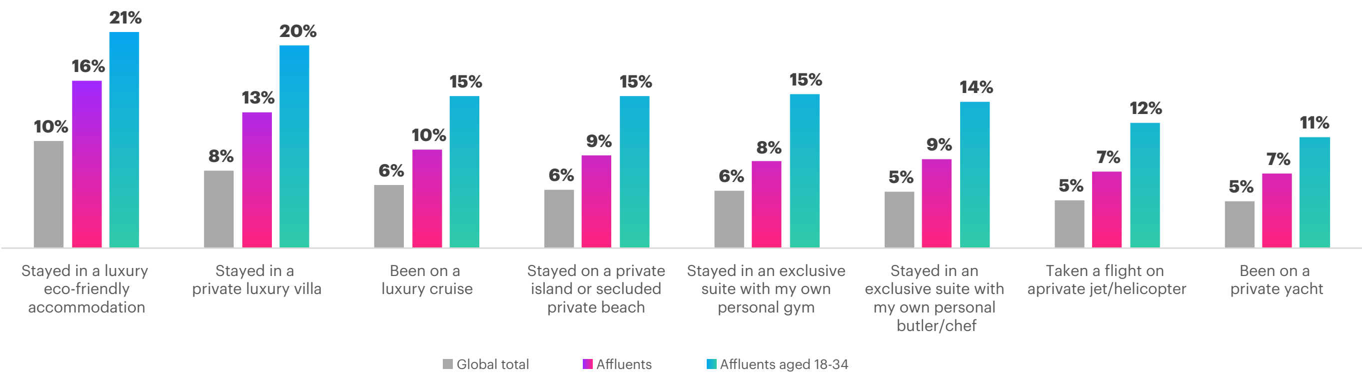
Through investigating how global consumers have interacted with various luxury products, services or experiences in the last three years, sustainable luxury accommodation ranks as top among both global consumers and those in the affluent high-income groups. Sustainability is increasingly a consideration when selecting somewhere to stay, and one in ten global consumers have stayed in luxury eco-friendly accommodation in the last three years, increasing by more than **50%** among affluents, and increasing two-fold compared to the global average among 18–34-year-old affluents.

The experience of staying in a private luxury villa, a luxury cruise, or a private island are the next most popular luxury travel activities across the last three years among global consumers. These scores increase significantly among affluents and escalate further among younger affluent consumers. In fact, affluents aged 18-34 are twice as likely to have taken part in all high-end travel activities in the last three years than the global total, presenting a highly attractive audience for luxury travel organizations and marketers.

▶ **SPEAK TO A RESEARCHER**

Travel experiences involved in the last three years

Global



Q: Which of the following types of luxury products/services/experiences have you been involved in within the last three years?

To further understand luxury travel experiences, YouGov data explores the luxury travel experiences affluent consumers aspire to, and what they are prepared to pay more for to enhance their luxury travel experience. Six core areas of luxury emerged:

- **Meaningful travel**
- **Privacy and seclusion**
- **Unique and personalized**
- **First class experiences**
- **Branded experiences**
- **Responsible travel**

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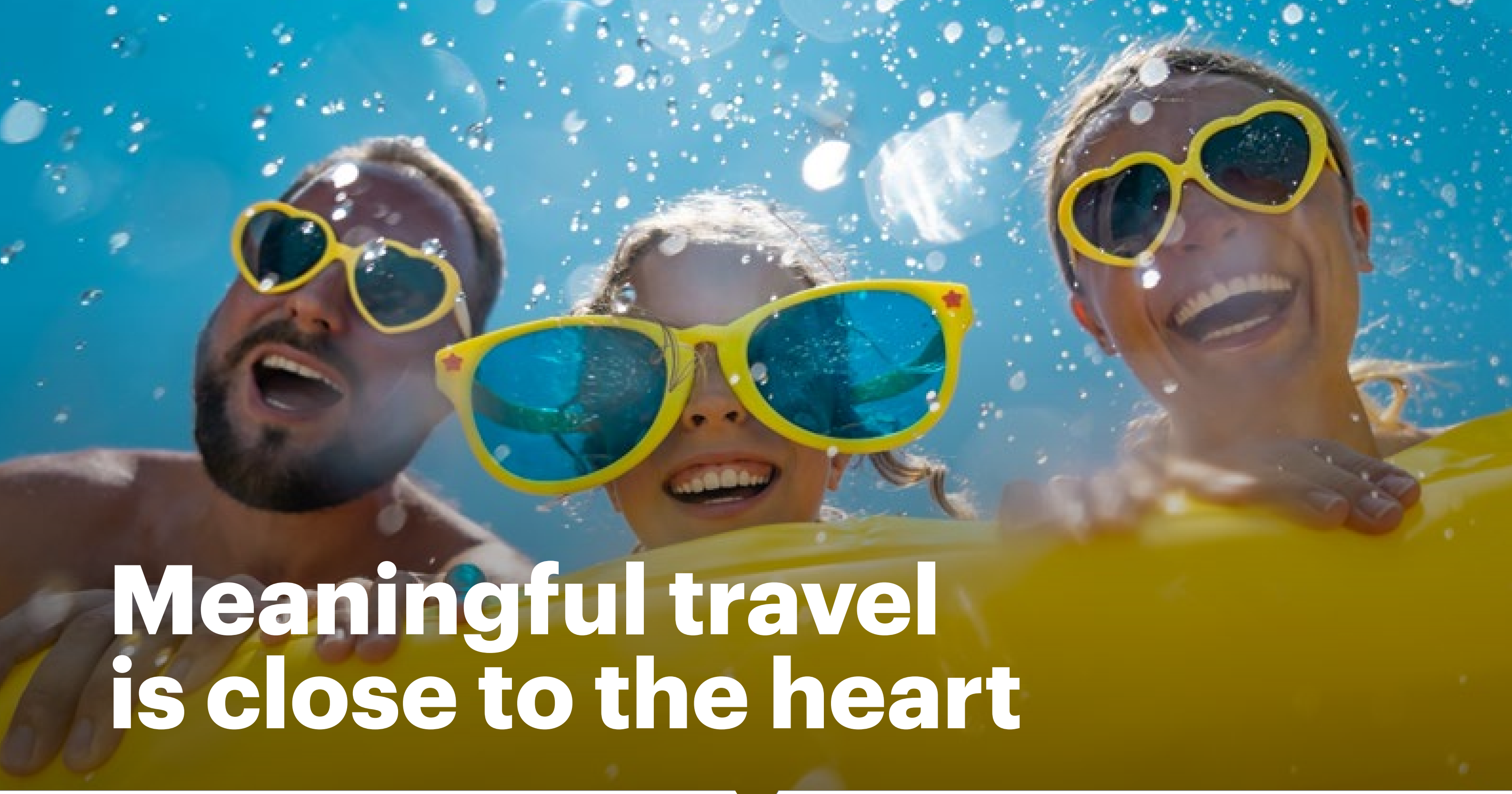


Meaningful travel is close to the heart

For many global consumers, the joy of luxury travel can be centred around having more meaningful travel experiences. This could be linked to connecting with a country's culture, having a unique experience that brings people closer to nature, or staying in a luxury environmentally friendly resort.

The hunger to seek more meaningful travel experiences is evident in our research with more than fifty percent (**51%**) of affluents agreeing that they are looking for more meaningful travel experiences since the pandemic, increasing to almost six in ten (**59%**) among younger 18–34-year-old affluents.

Net agreement (strongly/slightly agree) with the statement 'I am looking for more meaningful travel experiences since the pandemic'

51%
Affluents
vs 43% global total

59%
Affluents
aged 18-34
vs 53% 18-34 year olds

Q: How much do you agree or disagree with the statement 'I am looking for more meaningful travel experiences since the pandemic'

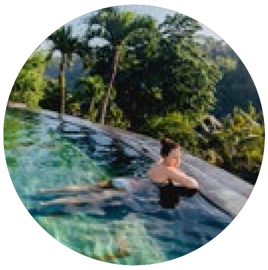
When looking at luxury travel experiences that global affluents would be prepared to pay more for, a series of meaningful travel experiences emerge. A third would pay more for a unique experience to get close to nature, and about a quarter would pay more for tailored experiences that connect them with local cultures, or to stay in an eco-friendly/sustainable hotel or resort. This appetite for travel enrichment is matched by both global affluents and younger affluents.

Luxury travel experiences affluents are prepared to pay more for

Meaningful travel

A unique experience to get close to nature/remote destination

Custom tours or tailored experiences to connect with local culture and environment



Eco-friendly/ sustainable hotels or resorts

An expedition cruise to adventurous destinations

	A unique experience to get close to nature/remote destination	Custom tours or tailored experiences to connect with local culture and environment	Eco-friendly/ sustainable hotels or resorts	An expedition cruise to adventurous destinations
Affluents	31%	24%	23%	18%
Affluents aged 18-34	30%	24%	25%	21%

Affluents   Affluents aged 18-34

Q: When thinking about luxury travel experiences, which of the following would you be prepared to pay more for?

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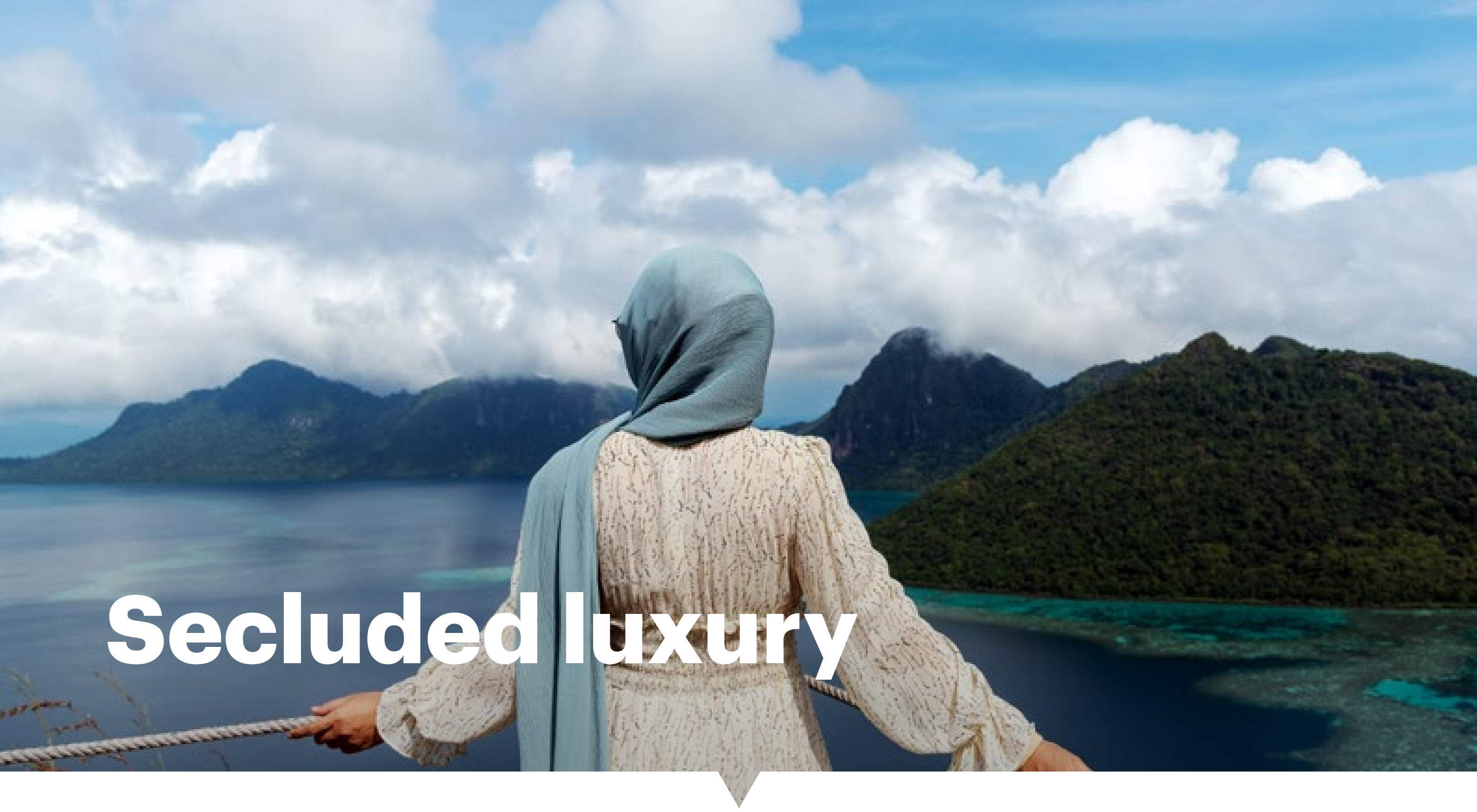

Secluded luxury

Privacy and seclusion exude luxury for global consumers as they seek luxury hideaways with fewer crowds and more intimacy – and they are prepared to pay more for it! More than a quarter of global affluents (**27%**) are prepared to pay more for villas and chalets in secluded and private locations to fulfil their luxury travel experiences. This increases to over three in ten (**31%**) among those in the younger affluent tier.

A fifth (**21%**) of global affluents would pay more for a luxury stay on a private island, and this desire to fully switch off in a private tranquil setting, increases among younger affluent consumers, rising to a quarter (**25%**).

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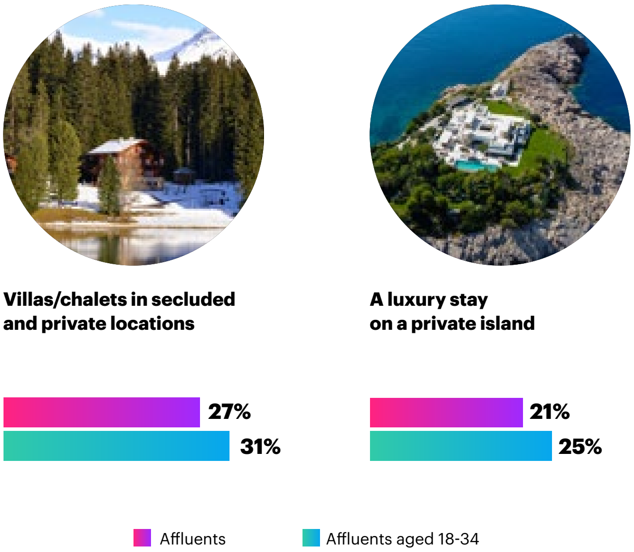
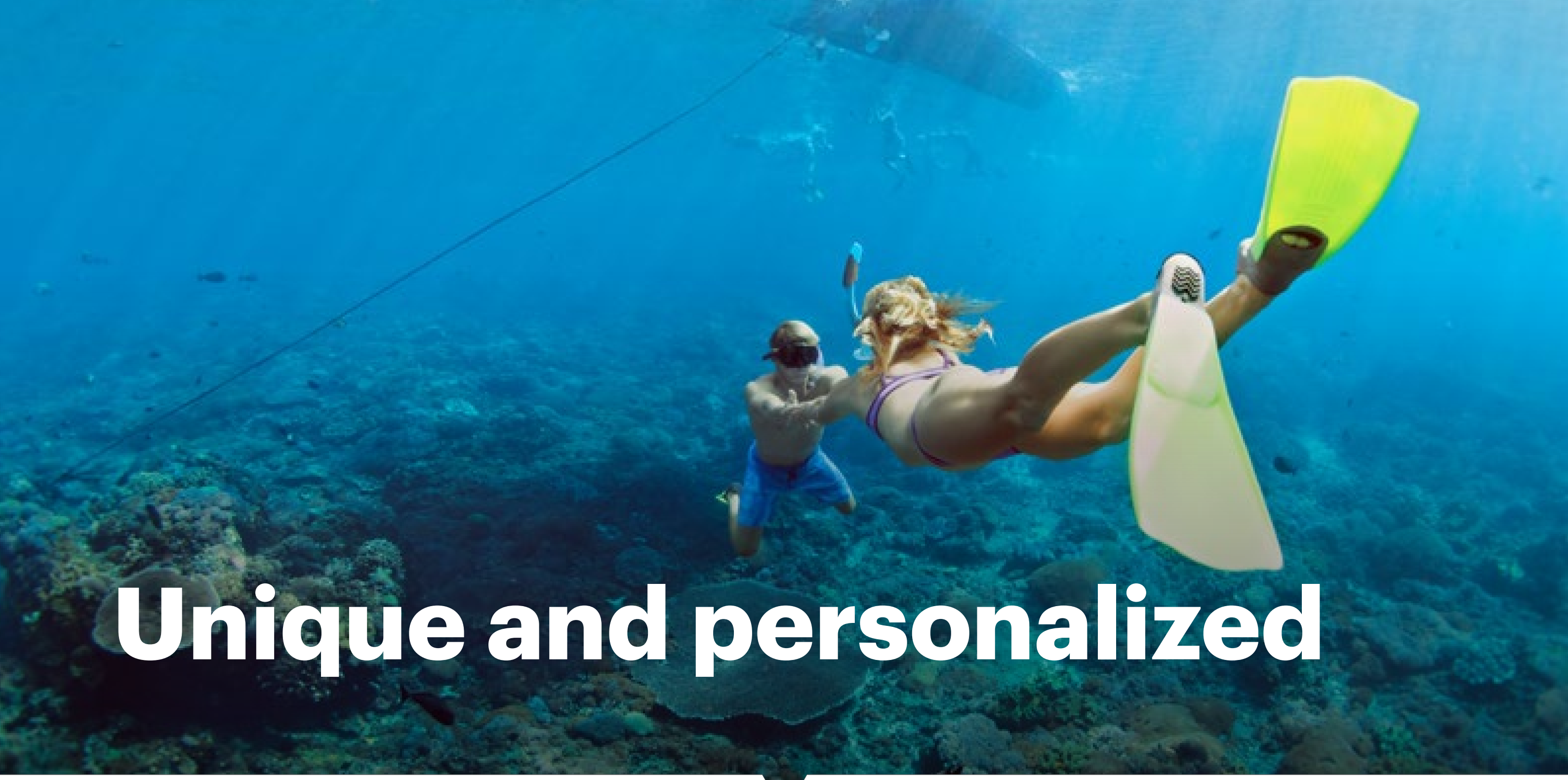
Luxury travel experiences affluents are prepared to pay more for

Privacy and seclusion



Q: When thinking about luxury travel experiences, which of the following would you be prepared to pay more for?



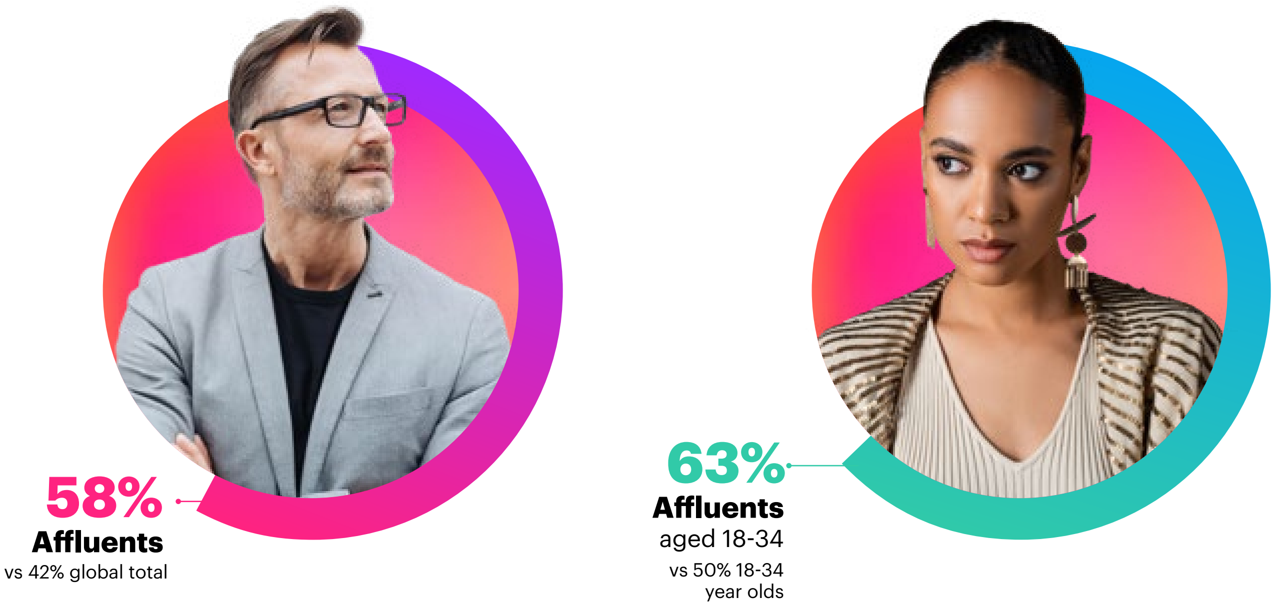
Unique and personalized

Whilst more than four in ten (**42%**) global consumers agree that they place high value on unique experiences, affluent and younger affluent consumers place even higher value on unique experiences increasing to **58%** and **63%** respectively.

Creating a personalized experience is an important element of luxury travel, and something that consumers are prepared to pay more for. The desire for bespoke itineraries, curated experiences and unique accommodation all add to the personal touch, and help travelers feel they are valued.

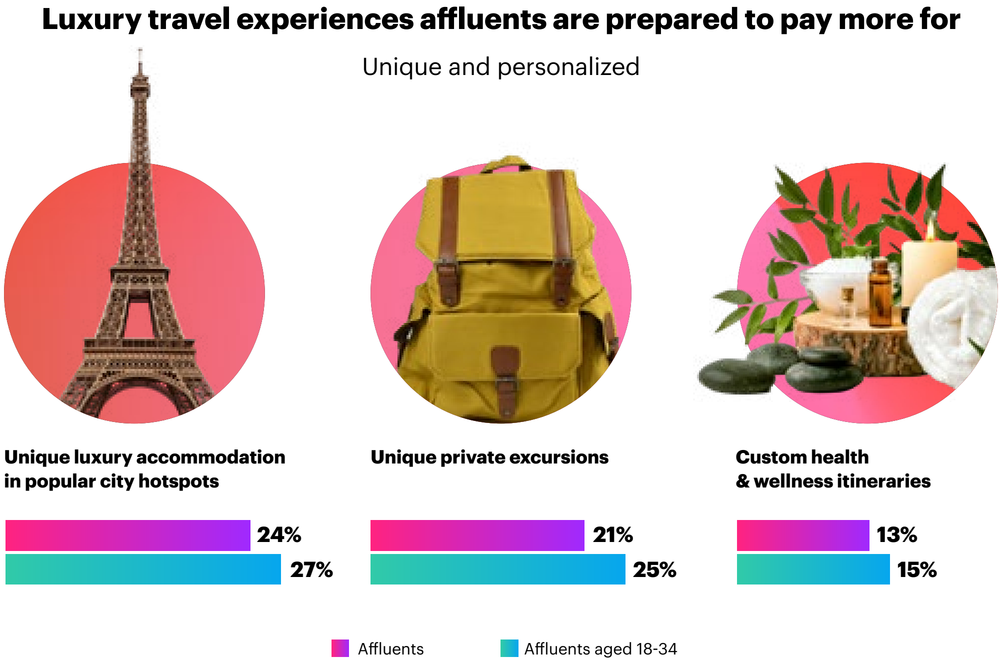
▶ EXPLORE MORE DATA

Net agreement (strongly/slightly agree) with the statement
'I place high value and I'm willing to spend more on unique travel experiences'



Q: How much do you agree or disagree with the statement' I place high value, and I'm willing to spend more on unique travel experiences'

More than a fifth of global affluents are willing to pay more to stay in unique luxury accommodation in popular city hotspots, or to embark on a unique private excursion. Slightly fewer are prepared to pay more for a customized health and wellness itinerary, but all these unique personalized travel experiences resonate further among younger affluents.



Q: When thinking about luxury travel experiences, which of the following would you be prepared to pay more for?

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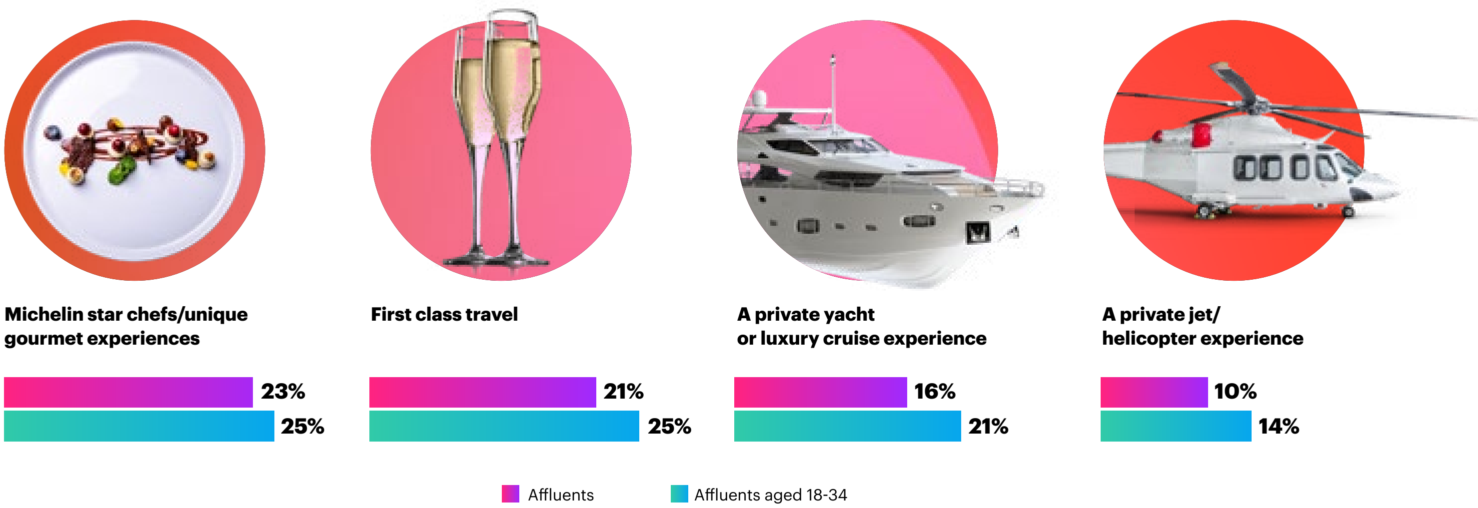
First class experiences

The allure of top-end experiences is another area of luxury travel that a select proportion of global consumers are prioritizing. Whether it's first-class travel, gourmet experiences, traveling by private jet, or on a private yacht, affluent travelers are willing to pay more.

Luxury travel experiences affluents are prepared to pay more for

Food and travel

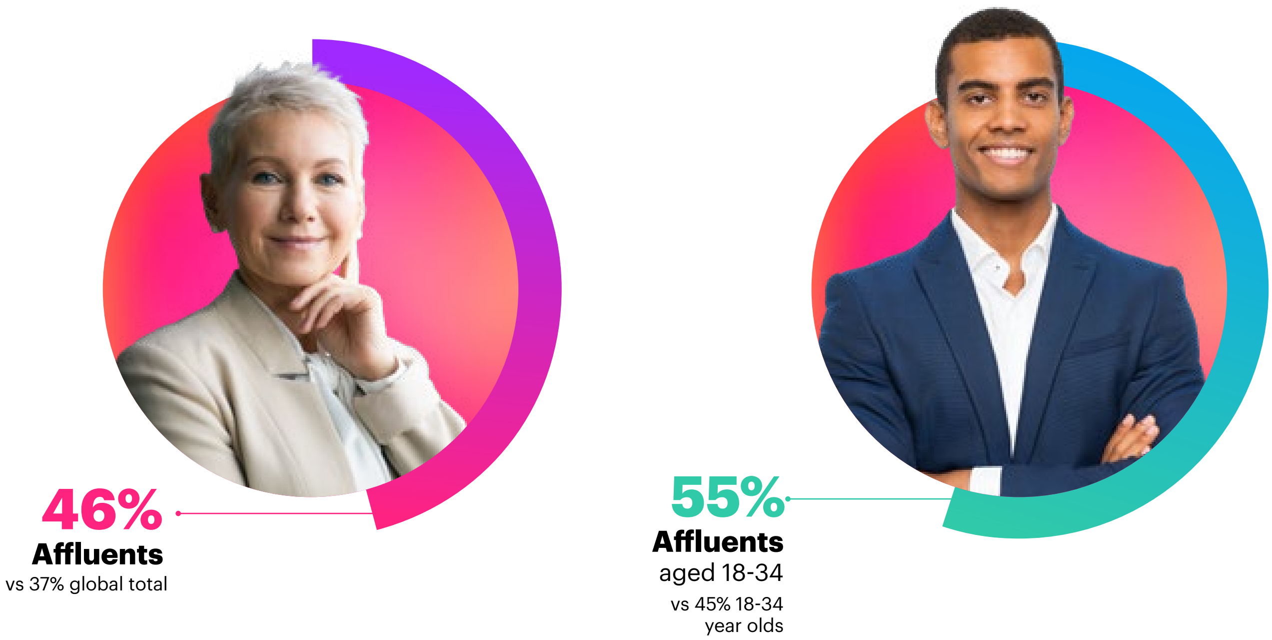


Q: When thinking about luxury travel experiences, which of the following would you be prepared to pay more for?

Luxury lodging brands continue to offer opportunities for product or service extensions and collaborations

An additional offering of the VIP experience are the types of branded products available to guests in their hotel rooms. Whilst **37%** of global consumers agree that 'I like hotels that provide branded products for guests in their hotel rooms', this rises to **46%** among affluents. This increases significantly to **55%** among affluent 18–34-year-olds, who place high importance on the brands provided during their vacation. These are valuable insights for luxury travel marketers and hospitality suppliers.

Net agreement (strongly/slightly agree) with the statement
'I like hotels that provide branded products for guests in their hotel rooms'



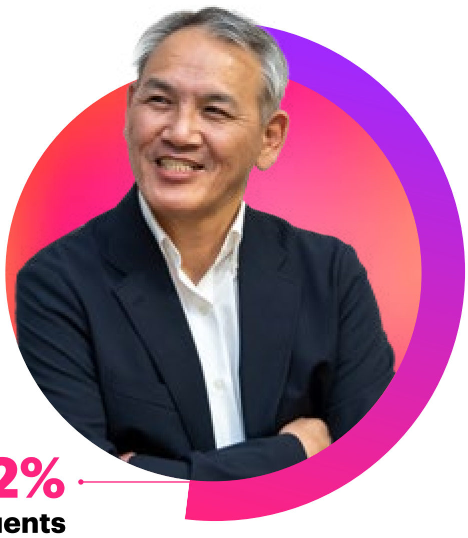
Q: How much do you agree or disagree with the statement' I like hotels that provide branded products for guests in their hotel rooms'

Responsible travel

A growing proportion of global consumers and travelers alike are concerned about the environment. They want to travel more responsibly and be aligned with travel companies that have a strong sustainability policy. Our research reveals that more than four in ten global consumers agree they are willing to pay more for responsible, eco-friendly, and sustainable trips.

This increases to over half of affluents, and almost six in ten affluent consumers aged 18-34! This emphasizes the importance of prioritising sustainability and environmental conservation within the luxury travel industry, in order to align with the values of this lucrative target audience.

Net agreement (strongly/slightly agree) with the statement
'I am willing to pay more for responsible, eco-friendly and sustainable trips'



52%
Affluents
vs 42% global total

57%
Affluents
aged 18-34
vs 51% 18-34 year olds

Q: How much do you agree or disagree with the statement 'I am willing to pay more for responsible, eco-friendly and sustainable trips'

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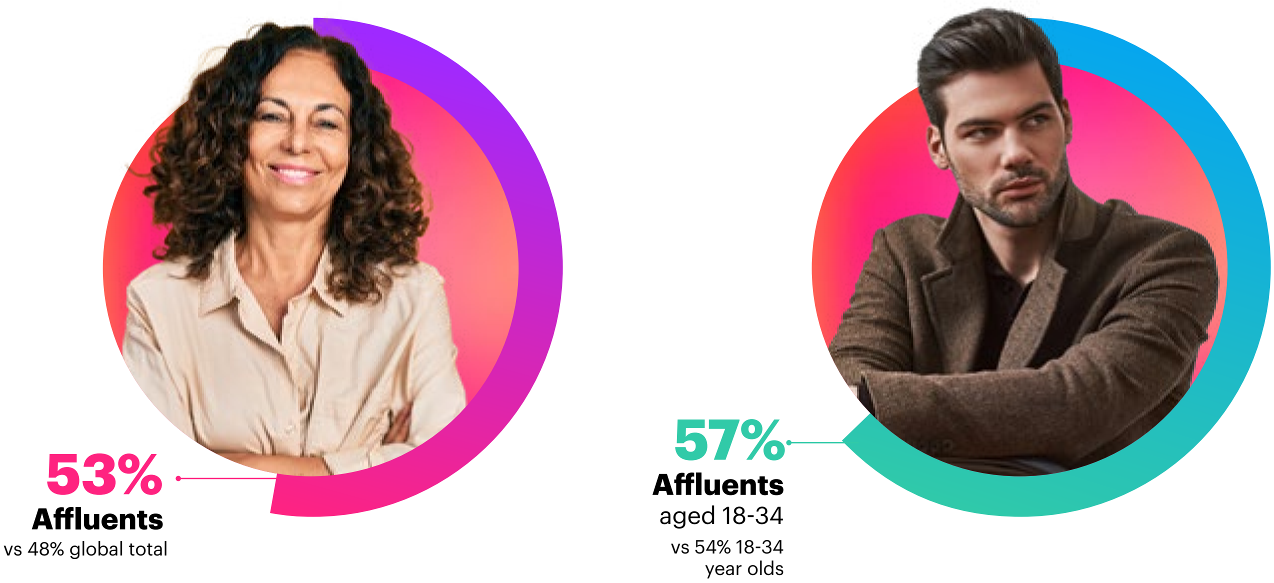
Sustainable travel is not only about valuing the environment and looking after our natural resources but also being aware of how tourism affects local people, business, and native culture. As such, global consumers are seeking travel companies that have strong sustainability credentials.

They want the reassurance that their travel experiences are benefiting local people, their community, their economy, and are preserving nature. Almost half of global consumers (**48%**) place high importance on selecting travel companies with a strong sustainability policy, increasing to **53%** among affluents. Younger affluent consumers have an even stronger yearning to connect with responsible travel companies. Travel organizations that are transparent and authentic in delivering on their sustainability capabilities can hope to be rewarded with an elevated relationship with responsible travelers.

Net agreement (strongly/slightly agree) with the statement 'It is important to me to choose travel companies that have a strong sustainability policy'



Q: How much do you agree or disagree with the statement 'It is important to me to choose travel companies that have a strong sustainability policy'

APAC regions over index on responsible travel

Comparing attitudes to responsible travel across the 18 markets surveyed, the Asian markets of India, Indonesia, China, Hong Kong, and Singapore are all more likely than the global total to agree with the importance of choosing travel companies that have strong sustainability policies. While more than **50%** of Spaniards agree it's important for them to choose sustainable travel companies, they are less likely than the global average to be willing to pay for it, suggesting the disparity between wanting to act sustainably and the cost implications for doing so. There is a heavy dominance of APAC countries who are prepared to pay for more environmentally friendly and sustainable vacations.

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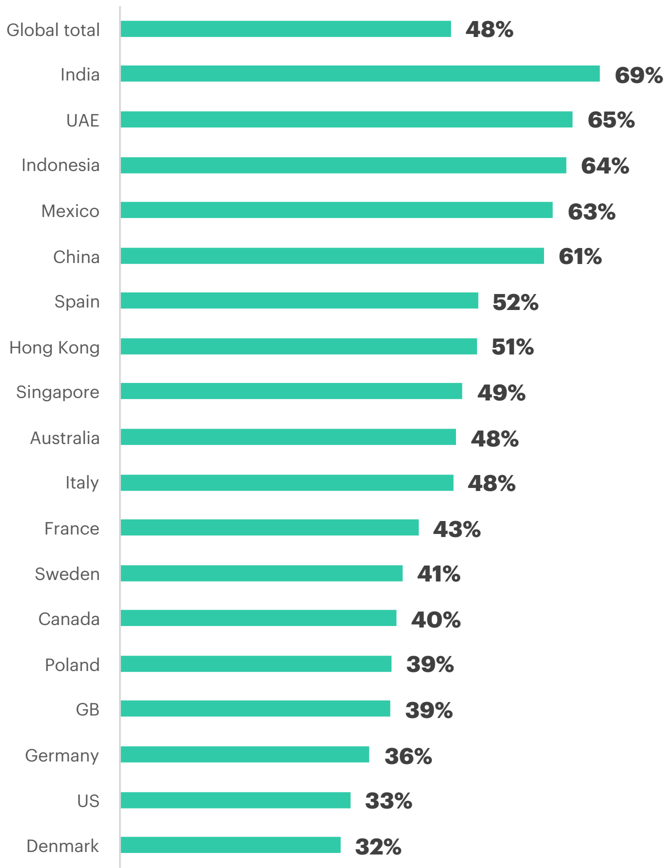
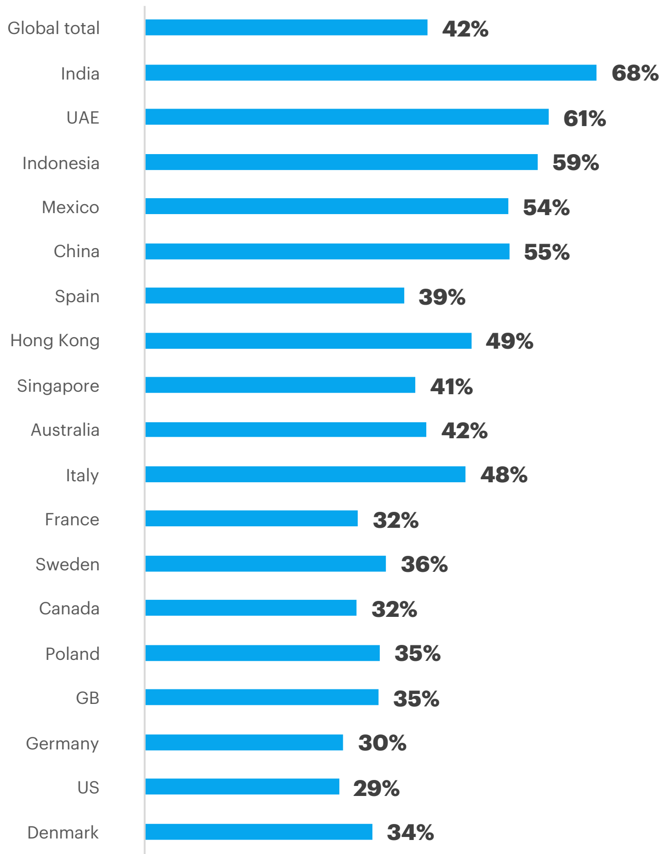
% agreement (agree strongly/agree slightly) with statements

Global total

'It is important for me to choose travel companies that have a strong sustainability policy'



'I am willing to pay more for responsible, eco-friendly, and sustainable trips'



Q: How much do you agree or disagree with the statement 'It is important for me to choose travel companies that have a strong sustainability policy'

Q: How much do you agree or disagree with the statement 'I am willing to pay more for responsible, eco-friendly, and sustainable trips'

PART - 4

Luxury travel in the future

Global consumers are spending more on travel, booking multiple trips, traveling with more people, and seeking more meaningful, personalized experiences that enrich them. By understanding travel preferences and delving into what excites and inspires them, we can gain a better vision of how luxury travel could evolve in the future. YouGov research identifies four key themes on the travel wish list of the global population, and the affluent consumer:

- **Safety**
- **Enrichment travel**
- **Quality**
- **Personalization**

Factors looked for in next travel destination

Global affluents

1st **37%** A secure and safe environment

2nd **36%** Experiencing different cultures

3rd **33%** Great local attractions and amenities

4th **32%** To learn new things/experience something new

5th **26%** Having the best culinary experiences

6th **25%** A once in a lifetime experience

7th **24%** Quality services

8th **22%** Enjoying quality luxury accommodation

8th **22%** A wide range of activities available

10th **21%** Improving my health and wellness

11th **18%** Finding an interesting tour, concert, or activity

11th **18%** Visiting remote destinations

13th **17%** Great entertainment

14th **12%** Having personalized experiences tailored to me

14th **12%** Doing things that few others can do

Q: What are you looking for in your next travel destination?

Safe travel
The desire to feel safe and secure in their next travel destination is the primary travel priority. Affluent consumers rank a secure and safe environment of top importance in their next destination (**+12%** above the global average). It will be key for destinations and hotels to reassure travelers that they are in safe hands.

Quality services
Affluent consumers score particularly highly for best culinary experiences compared to the global average (**+26%**). Moreover, quality luxury accommodation is a lower priority for global consumers, but it achieves the highest index among affluent consumers compared to the global average (**+52%**), emphasizing the value of quality and top end lodging brands among an upscale audience.

Enrichment travel
Part of the thrill in traveling to new destinations is being able to immerse and experience diverse cultures, enrich through learning or doing something new, and having once-in-a-lifetime experiences.

Affluent consumers seek authentic travel experiences that enrich and empower them to get closer to a destination's culture and community. High income groups over index on 'experiencing different cultures' and 'learn new things/ experiencing something new' (**+24%** and **+13%** above the global average respectively).

Personalized and exclusive
Visiting remote destinations, having personalized experiences, and doing things few others can do resonate with affluent consumers and luxury travelers who will be looking for brands, experiences and travel companies that understand their individual needs and unique requirements.

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How younger affluent travelers are likely to shape the industry- enrichment is key

Affluent 18–34-year-olds rank safety as a top priority, along with learning and experiencing something new. They seek further fulfilment by experiencing different cultures and creating deep once-in-a-lifetime memories plus take pleasure in having unique exclusive experiences that few others can do. A cultural appeal is particularly important for affluent 18–34-year-olds, with experiencing different cultures (**34%**) replacing safety (**33%**) as the top priority when considering their next travel destination.

For affluent consumers aged 18-34, the quality experience is further boosted by the enjoyment of quality luxury accommodation. With younger generations being Digital Natives, it would make sense for luxury lodging brands to map out buying personas and purchasing funnels focusing on how affluent youngsters are researching luxury hospitality options and interacting with established brands. It's important to relate to younger audiences in a different way than traditional communication to older customers if brands wish to demonstrate modernity, appeal to all ages, and grow a new loyal base of customers. Such communication needs to cent around convenience, personalization, and unique experiences, all things young, affluent travelers highly appreciate.

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The young generation of affluent consumers recognize the worth of personalized travel, visiting remote destinations, and the exclusivity of doing things that few others can do. As sophisticated explorers, for their future destination, they are looking for something unique and individual, that enriches them with superb service.

Looking ahead to the next trip, the core aspirations of affluent travelers are grounded in a greater focus on experiences, enrichment, personalization, and quality in a safe and secure environment.

Travel priorities for next travel destination among young affluents aged 18-34

Q: What are you looking for in your next travel destination?

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Future travel aspirations by country

However, in comparing the expectations of tomorrow's global travelers by market, we see some interesting nuances emerge across the 18 markets surveyed.

Focusing on the core themes, expectations vary when we explore for each travel factor the top three countries that rank highest.

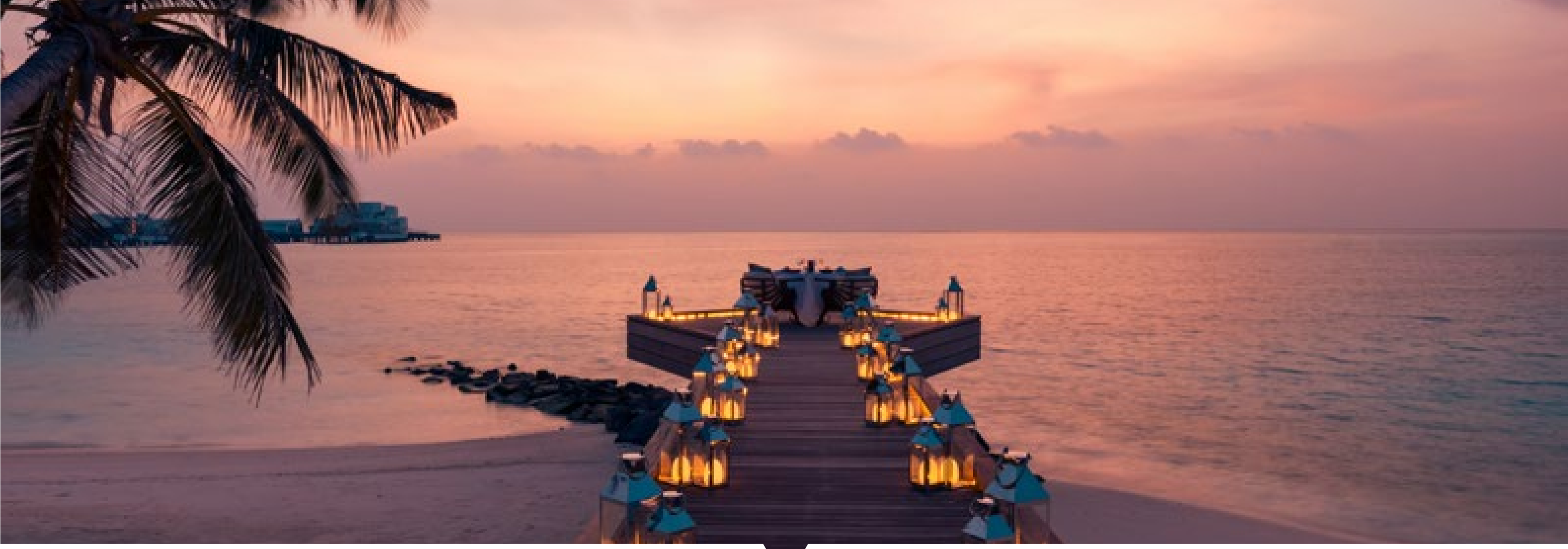
The top factor of providing a safe and secure environment is of higher importance for global consumers in Indonesia (**48%**), Singapore (**46%**) and Hong Kong (**42%**).

For travel enrichment, the allure of experiencing different cultures has higher appeal in the Asian and European markets of Hong Kong (**40%**), China and Singapore (**38%**) followed by Italy, and Spain (both **33%**). Localized attractions and amenities appeal to consumers in Singapore and Hong Kong (**42%** and **38%** respectively). Whereas Indonesians favor the enrichment of learning new things and experiencing something new (**37%**), along with Germans (**36%**), Mexicans, and Italians (**34%**). Health and wellness improvement ranks of higher importance in Poland (**32%**), Italy (**29%**), Mexico, and Germany (**27%**).

Quality expectations run high for Hong Kong consumers who are the most likely to desire the best culinary experiences (**50%**) and crave the enjoyment of quality luxury accommodation in their next destination compared to other countries (**21%**). Other countries seeking outstanding cuisine are Indonesia (**41%**) and Mexico (**26%**). Indonesians (**17%**) also value quality accommodation along with consumers in India, UAE and Australia (**19%**).

Isolation and remoteness are high on the travel itinerary for Mexicans (**22%**) closely followed by France and Italy (**21%**). While bespoke personalized experiences resonate more in Indonesia (**25%**), Mexico (**23%**), and Germany (**20%**). In fact, customization and personalization are key facets for Indonesians who are not only seeking vacation experiences tailored to their individual requirements but also want to stand out from the crowd by doing things few others have done (**17%**).

▶ **SPEAK TO A RESEARCHER**



Top three countries for each future travel priority

	1st	2nd	3rd	Global total
A secure and safe environment	Indonesia -48%	Singapore- 46%	Hong Kong - 42%	**33%**
Experiencing different cultures	Hong Kong - 40%	China/Singapore - 38%	Italy/ Spain - 33%	**29%**
To learn new things/experience something new	Indonesia -37%	Germany-36%	Mexico/ Italy - 34%	**29%**
Great local attractions and amenities	Singapore -42%	Hong Kong -38%	GB- 35%	**26%**
A once in a lifetime experience	Hong Kong - 33%	Mexico -29%	India/ Spain -28%	**22%**
Having the best culinary experiences	Hong Kong - 50%	Indonesia -41%	Mexico -26%	**21%**
Quality services	Mexico - 30%	Spain/ China/ India - 27%	Italy -26%	**21%**
Improving my health and wellness	Poland -32%	Italy- 29%	Mexico/Germany-27%	**20%**
A wide range of activities available	Singapore -23%	Indonesia - 22%	France - 21%	**17%**
Great entertainment	Mexico -29%	UAE -25%	India -24%	**17%**
Finding an interesting tour, concert, or activity	Poland - 22%	Spain- 21%	Sweden/China -20%	**16%**
Visiting remote destinations	Mexico - 22%	France/ Italy -21%	Spain/ India-19%	**15%**
Enjoying quality luxury accommodation	Hong Kong -21%	India/UAE/Australia - 19%	Indonesia -17%	**14%**
Having personalized experiences tailored to me	Indonesia -25%	Mexico -23%	Germany-20%	**12%**
Doing things that few others can do	Indonesia - 17%	Hong Kong/ India/UAE-11%	France/Poland/China -10%	**8%**

Q: What are you looking for in your next travel destination?

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Our data

The insights in this report are drawn from a recent global **YouGov Survey** to understand what luxury to understand what luxury travel looks like post pandemic, explore luxury travel experiences, what affluent consumers are seeking and their future travel aspirations. Our research covers 18 global markets of more than 19,000 respondents. The survey results were further bolstered by connecting respondent level data to YouGov's proprietary syndicated data solution for the travel & tourism industry specifically, **Global Travel Profiles**, allowing us to merge our respondents and their answers to the 100,000+ consumer attributes that we collect on an ongoing basis for audience segmentation and profiling.

Our survey was fielded from the 9th to 23rd November 2022. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted with mild weighting using interlocking demographic characteristics. For this report the following population representation was used:

Region	Market	Population sampled representation	Sample size (n=)
North America	US	National representative - 18+	**1,503**
North America	Canada	National representative - 18+	**1,015**
North America	Mexico	National (Urban focus) - 18+	**1,055**
Europe	GB	National representative - 18+	**2,011**
Europe	France	National representative - 18+	**1,007**
Europe	Germany	National representative - 18+	**1,061**
Europe	Spain	National representative - 18+	**1,010**
Europe	Denmark	National representative - 18+	**1,022**
Europe	Italy	National representative - 18+	**1,016**
Europe	Poland	National representative - 18+	**1,013**
Europe	Sweden	National representative - 18+	**1,015**
APAC	Australia	National representative - 16+	**1,030**
APAC	China	National Online - 16+	**1,028**
APAC	Hong Kong	National Online - 18+	**514**
APAC	Indonesia	National Online - 18+	**1,041**
APAC	India	National Online (Urban only) - 18+	**1,007**
APAC	Singapore	National representative - 18+	**1,052**
MEA	UAE	National representative - 18+	**1,086**

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Thank you

YouGov is an international research, data and analytics group. We have been building an ever-growing source of consumer data for over **20** years, creating the richest and most complete understanding of your customers' complex lives. We call it living data. Understand what **22 million+** registered panel members in over 55 markets are thinking, on over a million - and growing - data points. Re-Contact and dig deeper to explore, plan, activate and track marketing activity with certainty, at speed, every time.

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