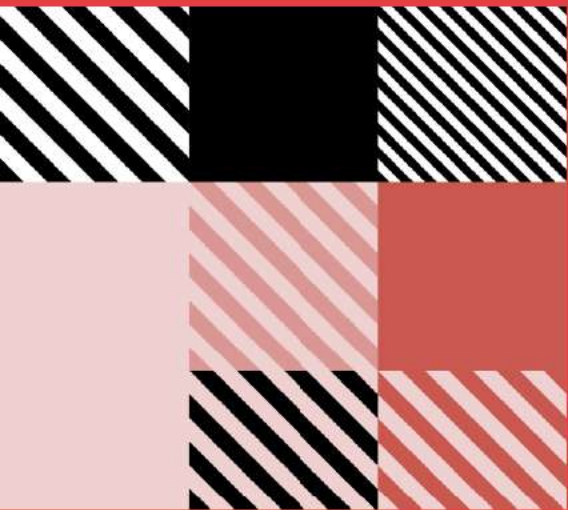


TRAVEL TRENDS 2023

A peek into the latest micro trends that are changing the way we travel

Ogilvy



A QUICK NOTE

Our journey curating these trends

It's been a great revival year for travel. Passenger traffic has already exceeded pre-pandemic levels and there is new-found desire to savour the old and experience the new.

The world of travel is undergoing transformation. There have been major shifts in how we plan, book and travel. And this piqued our curiosity.

You've already heard of friendcations and revenge travel. We've uncovered 21 more emerging travel trends that present bold new opportunities.

We recognize that Asia doesn't operate in isolation. While this report focuses on Asia, we have also investigated how Asia is being influenced by global travel trends.

An understanding of these trends helped us unlock answers to questions such as:

How are travelers being inspired today?

What are the new, emerging travel experiences?

How are people planning their trips?

What's changing in the way they book?

We hope you enjoy surfing through these trends as much as we enjoyed uncovering them and documenting them for you.

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WHAT'S INSIDE

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THE JOURNEY

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THE 5 STAGES OF A TRAVELER'S JOURNEY

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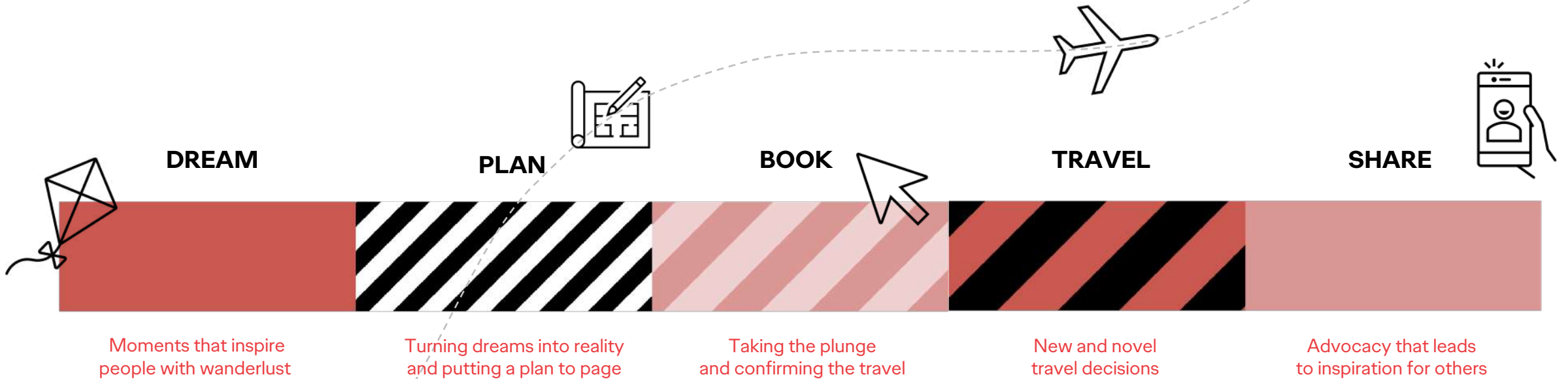
TREND & OPPORTUNITY WITHIN EACH STAGE

A hiker with a red backpack is walking away from the camera on a dirt path that leads into a valley between two large, rocky mountains. The sky is overcast and grey. The overall scene is one of a long, open journey.

THE JOURNEY

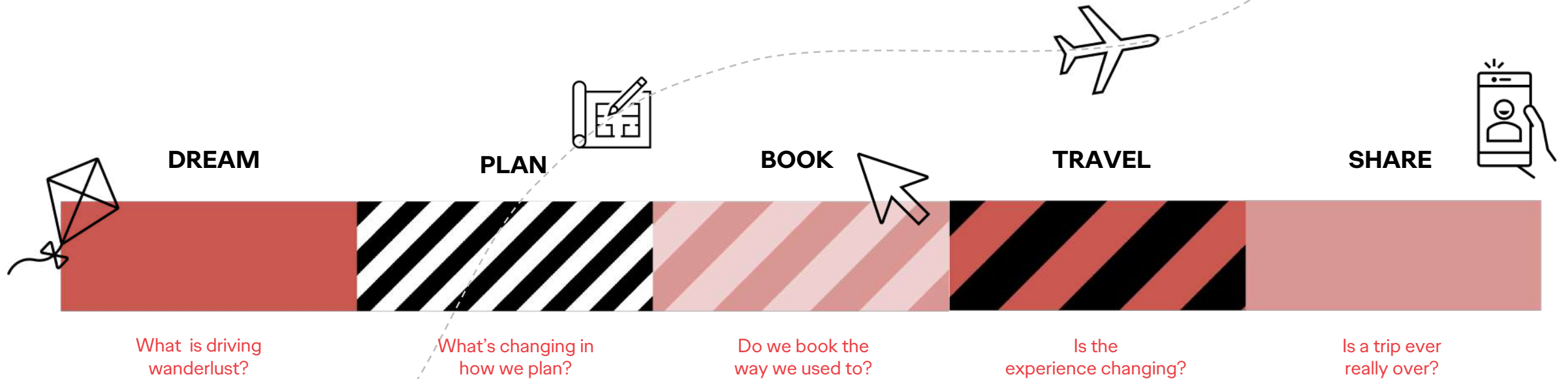
A TRAVELER'S JOURNEY

From a thought to the trip, a traveler goes through these 5 stages from planning to living the dream.



A TRAVELER'S JOURNEY

As we uncover new trends in each of these phases, we look to answer the following questions



A woman wearing a wide-brimmed hat and a green patterned dress is swinging on a swing set. She is seen from behind, with her arms raised holding the chains. The background features a scenic landscape with rugged mountains, a lake, and a wooden railing in the foreground. The sky is overcast with grey clouds. The word "DREAM" is written in large, bold, red capital letters across the top of the image.

DREAM

What is driving wanderlust?

1

TIKTOK

 Search or type a URL



1 TIKTOK IS THE NEW GOOGLE SEARCH

The trend

40% of GenZ (18 to 24-year-old) users are turning to TikTok or Instagram instead of Google Search or Google Maps when it comes to looking for information – this also extends to the world of travel.

While traditional search may provide more detailed information, search on social platforms gives you visually stunning travel inspiration, a hyper-realistic feel of the place and travel hacks.

The opportunity

Drive discovery and memorability through social content that helps consumers get inspired with new travel experiences.



Travel inspiration search now happens within social platforms.

Some of the most popular travel hashtags on TikTok are:

#wanderlust: 3.2B views
#beautifuldestinations: 2.3B views

2

SLEEP-CATIONS



2 SLEEP-CATIONS

The trend

Urban dwellers are hunting for the optimal shut-eye and are willing to travel for it.

Between January and February 2023, the search for “sleep retreats” increased by **1100%**. With a focus on improving wellness and mental health, travelers are looking for novel ways to feel renewed and recharged – even if it means going to a new place to just sleep.

The opportunity

Better sleep is a powerful promise.

Hence, focus on creating customized programmes for the relaxation-seeking travelers so they feel well-rested to take on their hustling lifestyle again.



Revivo in Bali offers ‘Sleep Well’ healthy holidays which includes restorative yoga, primordial sound meditation, balanced breathing or Pranayama, ancient Yoga Nidra and Ayurvedic Shirodhara with chanting.



Anantara Mai Khao Phuket Villas in Thailand has a Sleep Restoration Programme which starts with a sleep test and a sleep doctor consultation. This helps determine your sleep quality and quantity.

3



LIVING IN THE STAYCATIONER'S ERA

3 LIVING IN THE STAYCATIONER'S ERA

The trend

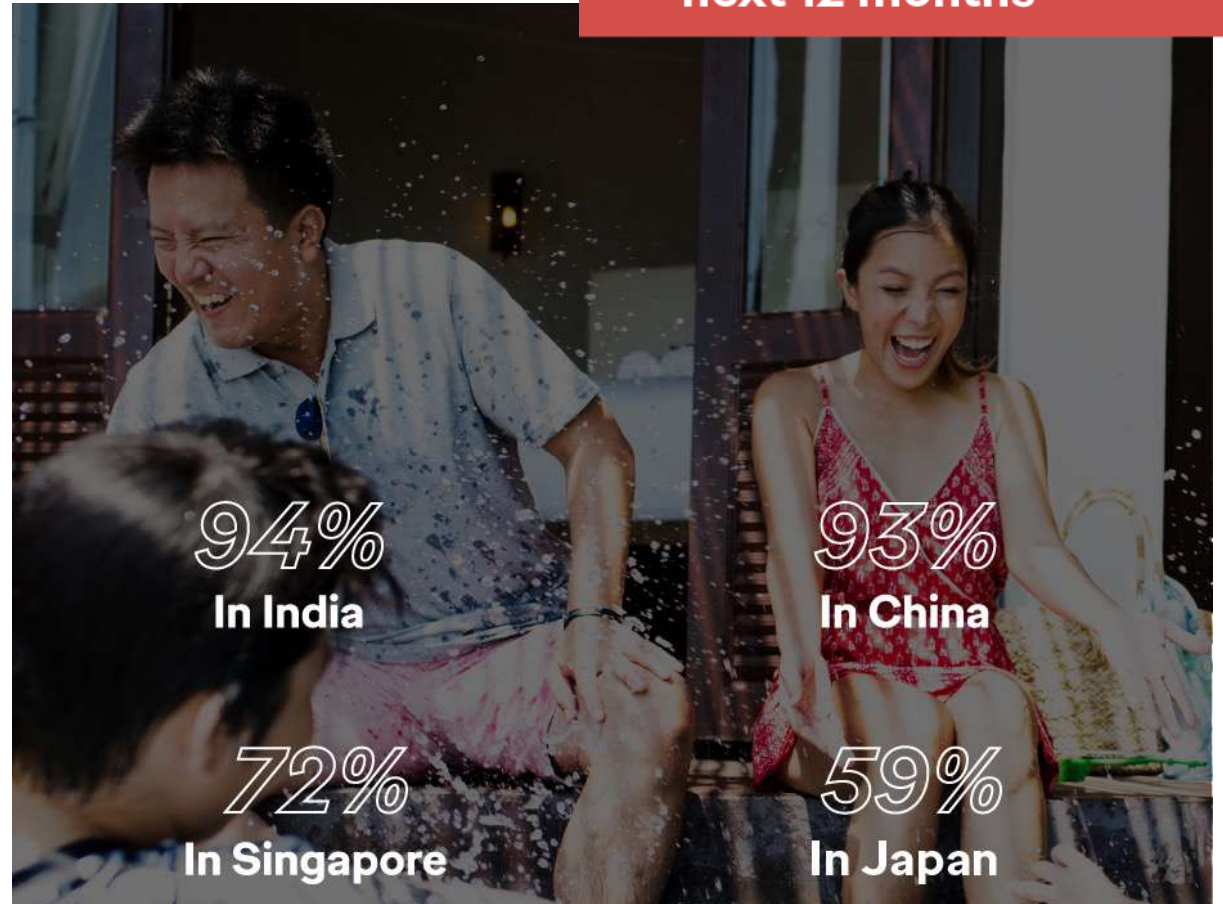
The pandemic accelerated the staycation experience and it's a trend that is not going anywhere. The definition of a holiday has evolved - especially for families with young children, for the elderly for whom long flights may not be ideal or just for a long weekend.

The USP of a staycation continues to be quality time with loved ones or yourself, without the stress of travel.

The opportunity

Domestic travel is a big market and city exploration has been on the rise since Covid-19. Hotels and experience curators should continue to innovate and attract the ever-seeking staycationer.

Intend to take a *staycation* in the next 12 months



4

THE BUCKET LIST ITCH



4 THE BUCKET LIST ITCH

The trend

Along with revenge travel came the surge in bucket list adventures. Ticking off these *'milestone trips'* **have more than tripled** since the pandemic.

Bucket lists were trips that would be painstakingly planned and budgeted for but in a stark shift, we see consumers living more for the moment with dream destinations being planned for in a 3–6-month future.

The opportunity

There is an urgency to check off bucket list destinations. Hotels, airlines and experience agencies can help make these milestone trips more accessible and achievable for travelers.

According to Trip.com, global hotel bookings for arrivals between March 15 and June 30 2022-2023 increased by 237% YoY.

Japan was the #1 choice for Asian travelers as the first destination they wanted to visit/ revisit when borders opened.

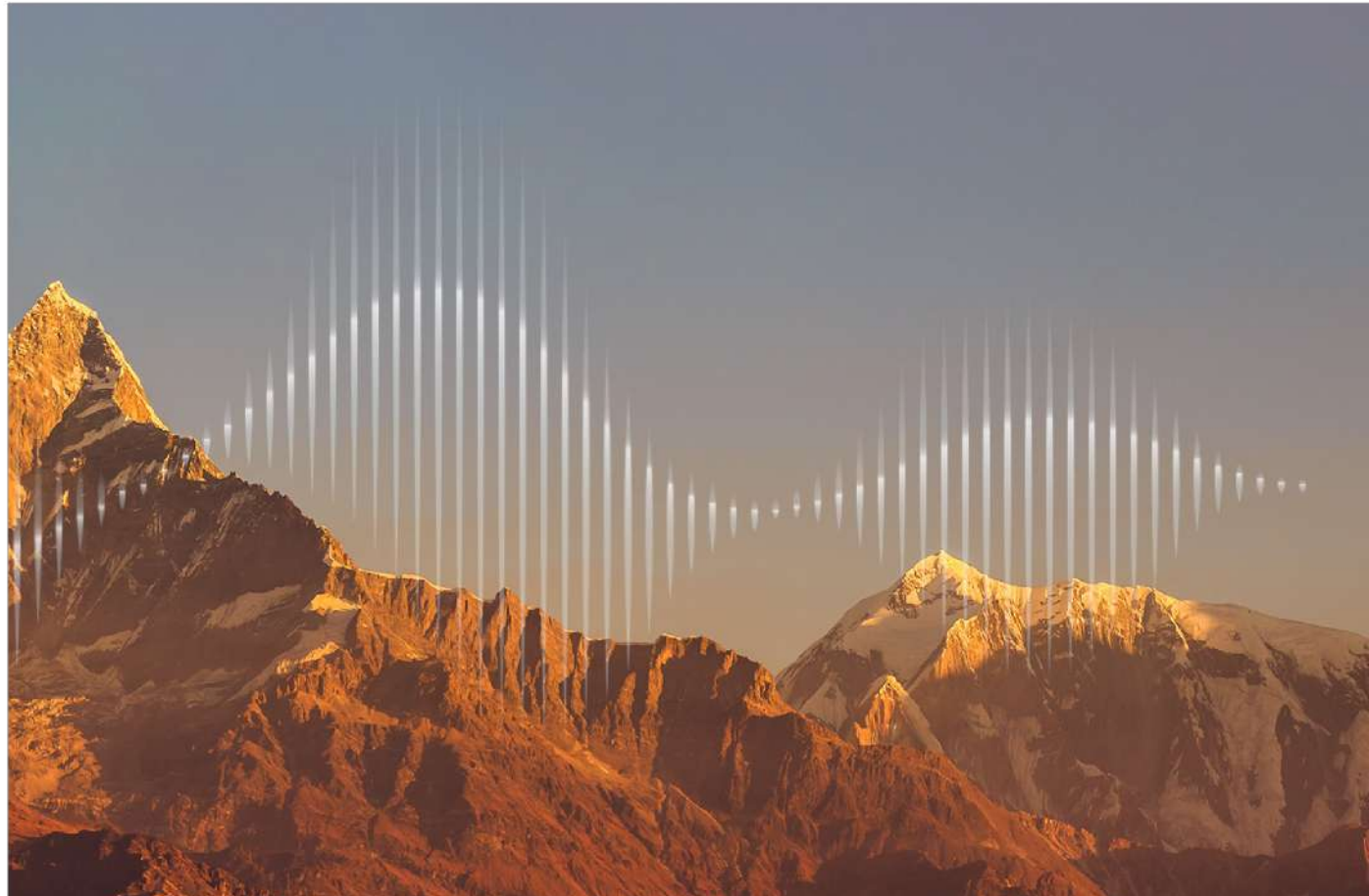


There has been a wave of new Antarctica cruise offerings.

Travel specialist Ashton Palmer anticipates “a little oversupply in the next two years as companies jockey for position.”

5

MUSIC TAKES US PLACES



5 MUSIC TAKES US PLACES

The trend

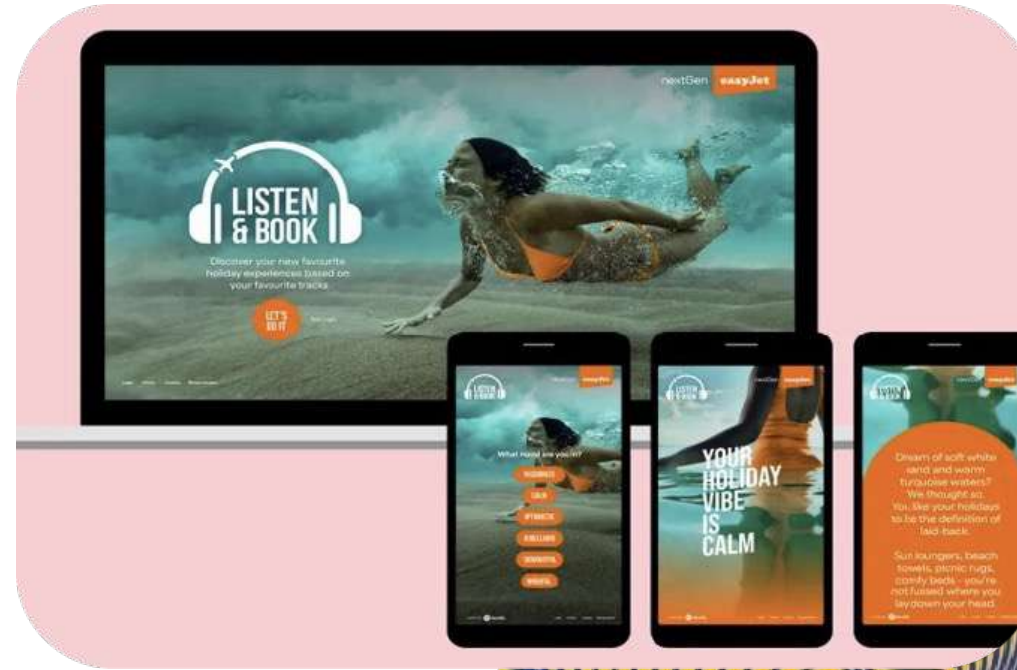
Calm, warm and dreamy music can transport you to Bali or Lisbon, or in a house dance festival in Barcelona. Travel and music are more entwined than we can imagine.

Music can subliminally charge your mind with travel inspiration and help you understand the type of traveler you are while connecting you to the right city and experiences with a similar vibe.

The opportunity

Travel destinations have their own music associations like Sweden with Abba, Belgium with Tomorrowland etc.

Can we inspire travelers through music by creating a signature playlist for our brand?



'Listen & Book' – a collaboration between EasyJet and Spotify, leverages Spotify's unique streaming intelligence to make it possible for people to discover their holiday personality based on their listening habits.

This personality is then matched to tailored travel experiences across Europe.

W Hotels has music playlists that are signatures of each city. They also engage with loyal guests via music platforms.



6

SILENT RETREATS



6 SILENT RETREATS

The trend

One gift from the pandemic has been silence. People miss the sound of the birdsong over traffic.

There's been a surge in sign ups for silent retreats where travelers can focus on yoga, breathwork to practicing 10 hours of meditation a day while following strict rules alongside real monks in temples of Thailand.

The opportunity

Can we create silent zones within hotels or airlines specifically for the *solitude seekers* to make them feel they're welcome?

Bali Silent Retreat is an off-the-grid-eco-sanctuary focused on peace, silence and restoration. There's no social talking nor e-devices, except at the office and co-workspace.



Zen Buddhist and Yoga Retreat helps you practice silence and introspection through Zen dharma, meditation and Hatha yoga away from the hustle of the city.

7



**FRESH
FACE TRAVEL**

7 FRESH FACE TRAVEL

The trend

Before you grab your bags at Incheon Airport, you can fit your face into a spectral imaging machine to get your skin analysed for its health. The A.I.-powered analysis is a free service courtesy of Korea's Medical Tourism Support Center.

Both men and women are traveling for cosmetic enhancements, and it has become an acceptable and accessible form of self care.

The opportunity

Post treatment downtime care by the travel industry (hotel or airlines) that makes travelers feel safe and cared for in a new unexplored space.



The worldwide medical aesthetics industry is expected to reach \$45.5 billion by 2027.

▶ Korea is the *'it'* destination if you're looking to get your face reshaped, the V-line surgery, laser treatments, injectables and more.

▶ Seoul boasts more cosmetic surgeons per capita than anywhere else on the planet.



PLAN

What's changed in how we plan?





8

AI MY TRIP



8 AI MY TRIP

The trend

Generative AI is taking over the role of a travel agent. You can now use AI and ChatGPT to prepare your travel itinerary within seconds by feeding in your destination, budget, number of days etc.

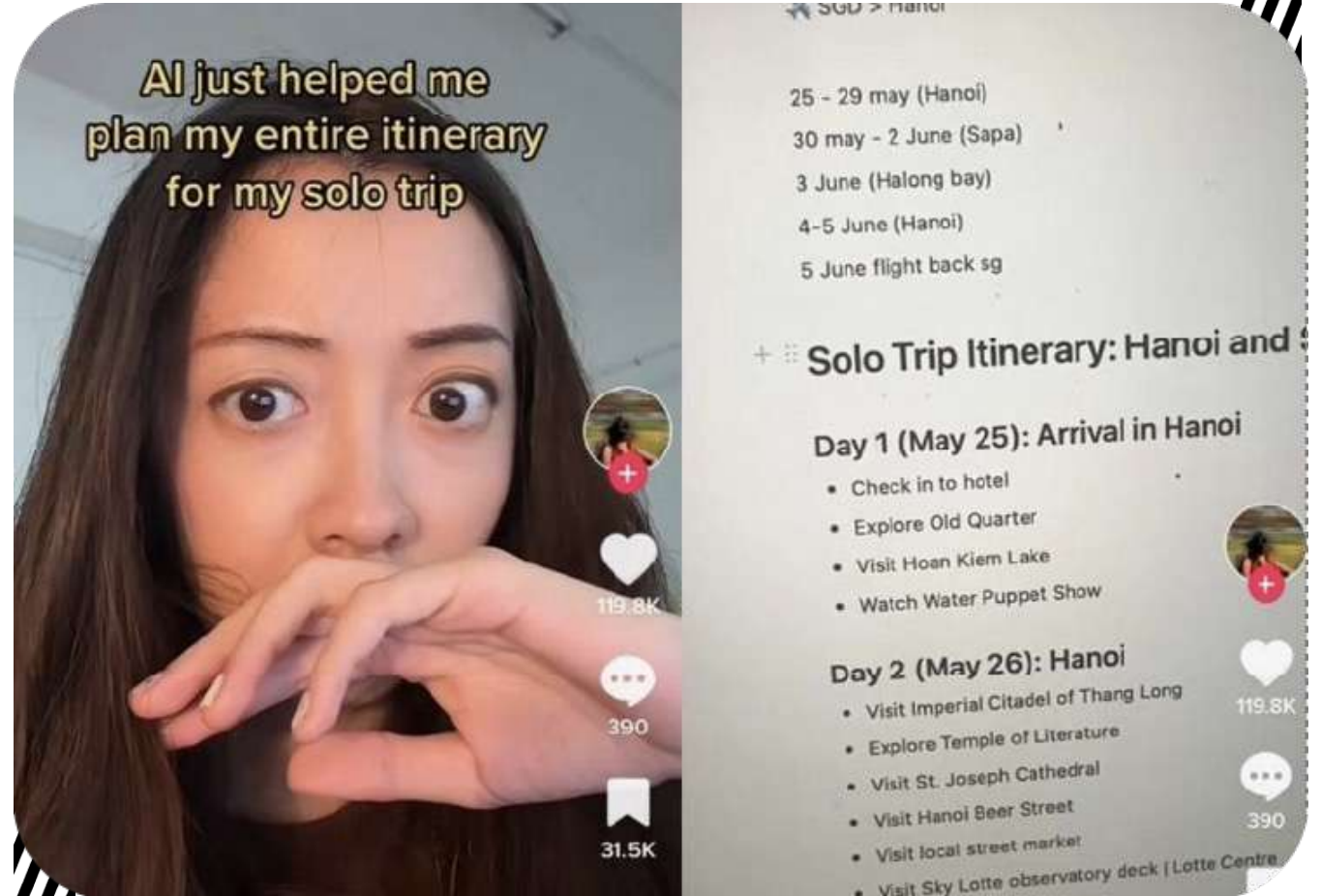
Rise of platforms like Roam Around, Vacay etc. have made the the complex and research-intensive travel planning process completely effortless while still prioritizing personalization, preferences and interests.

The opportunity

Hotels and airlines can offer AI-generated recommendations for travel itineraries to make the planning and booking process a one-stop shop for travelers.



Rise of several AI tools to help consumers plan their itineraries around the world.



Singaporean TikTok user, Mel used the Notion AI writing assistant to help plan her 12-day solo trip to Hanoi, Vietnam.



9

TRAVEL FOR BLEISURE



9

TRAVEL FOR BLEISURE

The trend

'Bleisure' : Business with a side of leisure is trending stronger than ever. From nomad visas, hotels offering longer term stays to airlines offering free WIFI all through the journey - people can travel without being off the grid.

Therefore, a new type of traveler has emerged, always switched on with carefree moments packed into the everyday.

Digital nomads contribute a global economic value of **\$787 billion per year.**

The opportunity

Enable digital nomads with technology and communication tools to be able to enjoy the best of both worlds.

Nomad Pass

Malaysia and Thailand have launched the Nomad Pass and the Work-from-Thailand Professionals programme attracting a whole new segment of digital nomad travelers.

There are an estimated 35 million digital nomads worldwide.



10

GAMERS WHO TRAVEL



10 GAMERS WHO TRAVEL

The trend

The number of esports hotels in China reached **11,000 in H1 of 2022 and is expected to exceed 20,000 by the end of 2023.**

These are not only attractions, but also serve a critical purpose – gamers hate to be offline, and these hotels become the preferred choice while planning.

Gaming is not just a hobby but a lifestyle – and gamers want to be able to continue gaming even when they travel.

The opportunity

Hotels may integrate gaming into their offering as they do business centres. Airlines could also consider gaming integration especially within long haul flights.



The Tencent-Ouyu esports hotel in China features top-of-the-line hardware, comfortable setups, bootcamps, access to professional live-streaming, and even incubation training areas.



Singapore's ARENA eSports flagship hotel is a 25,000 sq. ft. equipped with coworking, co-playing and co-living facilities.



11

DNA TRIPS



11

DNA TRIPS

The trend

Ancestry tourism is enabling people to 'find themselves' and gain knowledge of where their ancestors lived, walked and worked.

With a growing desire to understand where they came from, people want to find connection in an increasingly disconnected world. It's a different feeling walking in the footsteps of your forefathers, feeling a sense of belonging in the world.

The opportunity

Tapping on to ancestry tourism can provide an enriching experience to travelers beyond other types of holidays.



Platforms like 23andme that offer DNA testing partnered with Airbnb to help people 'connect to their heritage'. Once you get your results, Airbnb will suggest rentals and experiences in the countries your ancestors are from.





12

PLUS SIZE TRAVEL



12 PLUS SIZE TRAVEL

The trend

What comes to your mind when you think of vacations – relaxation, excitement, exhilaration?

It's not usually the case for plus-size travelers who associate planning holidays with stress, disappointment, FOMO to say the least. Airline seats are too small, beaches are intimidating, spa bathrobes don't fit etc.

But there is a growing market catering to plus-size travelers making them feel emotionally safe, comfortable and reassured.

The opportunity

Any BODY can and should be able to travel. The travel industry needs to ensure it has the right infrastructure and facilities to make everyone feel included and safe.



Influencer Annette Richmond, founded Fat Girls Traveling, which hosts group trips and retreats for plus-size travelers.



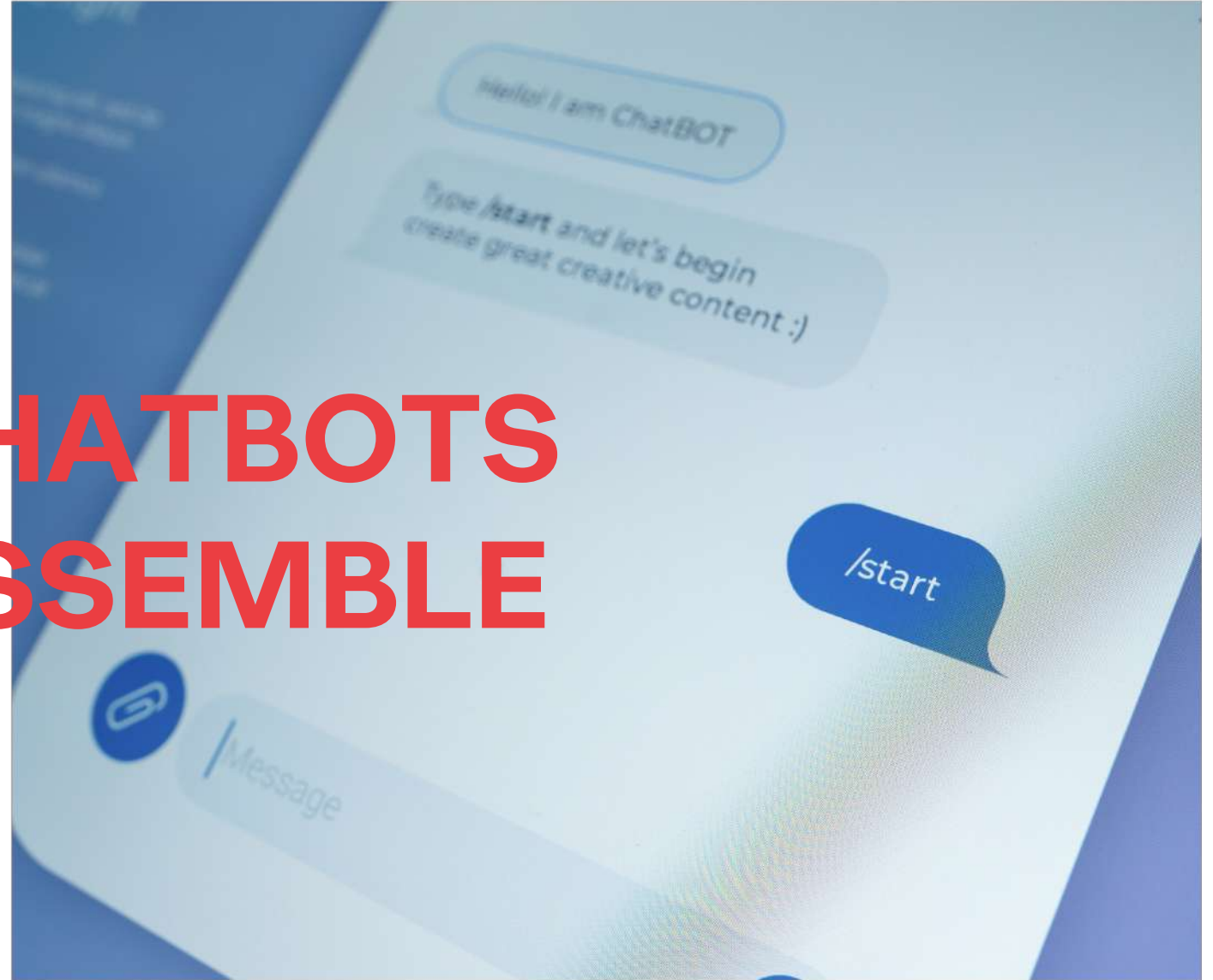
BOOK

What's the future of how we book?



13

CHATBOTS ASSEMBLE



13 CHATBOTS ASSEMBLE

The trend

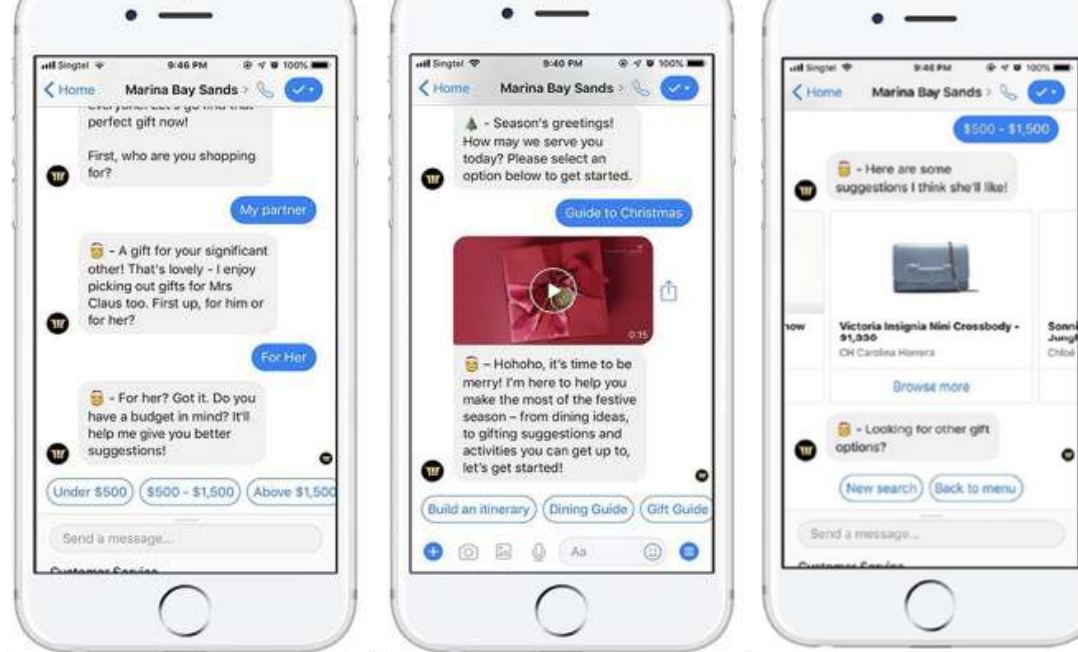
Conversational commerce has a new demand in personalization the customer prefers it on platforms they already exist on.

Hotels like Marina Bay Sands and Park Royal have integrated their chatbots into Messenger and WhatsApp, delivering a quicker response system.

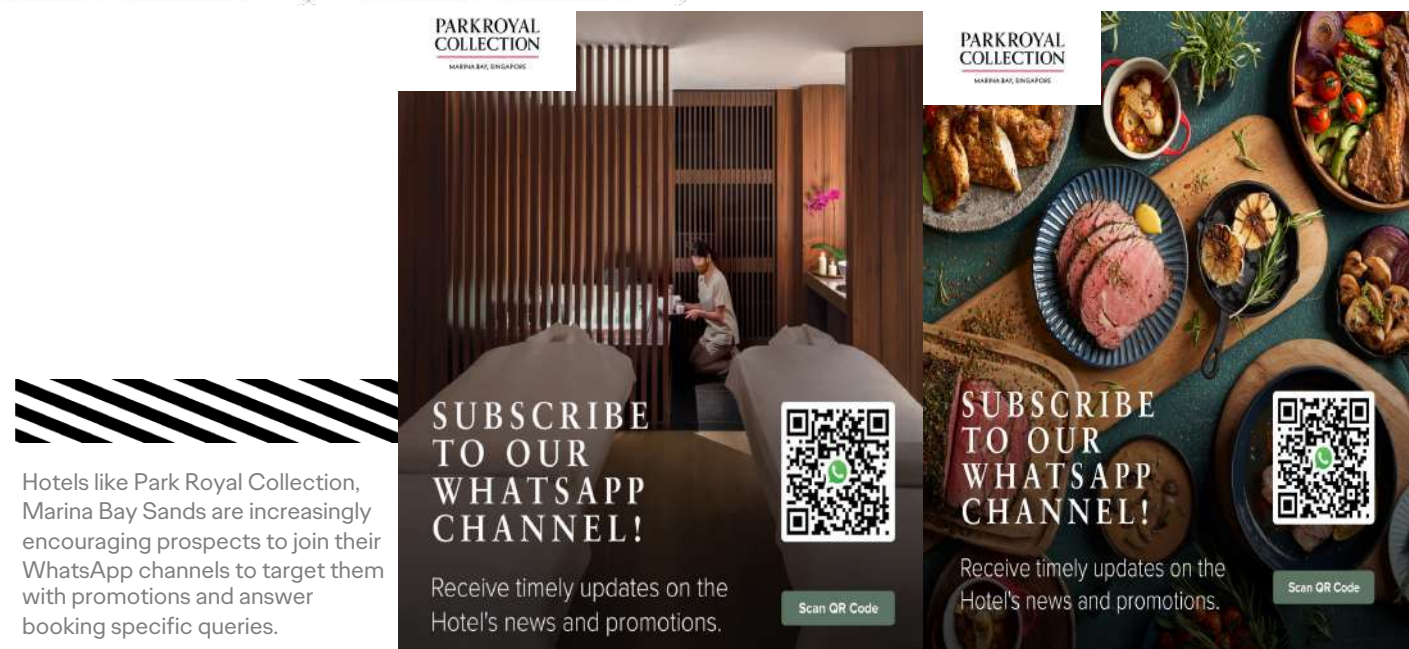
The ease of communicating at lightning speed through apps they frequent daily, makes brands more relevant and bookings easier.

The opportunity

Integrating chatbots into messenger apps is increasingly becoming a must-have to provide better customer service support, higher customer loyalty and increased speed of booking.



Marina Bay Sands in Singapore Facebook Messenger and Instagram to provide guests with hotel booking support, shop and dine recommendations, dynamic itinerary building.



Hotels like Park Royal Collection, Marina Bay Sands are increasingly encouraging prospects to join their WhatsApp channels to target them with promotions and answer booking specific queries.

Receive timely updates on the Hotel's news and promotions.

14



LIVE

INFLUENCER-HOSTED
TRAVEL

14 INFLUENCER-HOSTED TRAVEL

The trend

Influencers aren't new to the travel industry. But now they offer a new dimension to their role – becoming your travel guide.

Traveling with an influencer from platforms like Instagram or TikTok means you'll be with other people who enjoy the same travel style and interests.

The influencer curates photo-worthy itineraries with vetted tour companies, which means followers simply have to book the trip and flights.

The opportunity

Collaborating with travel influencers can considerably drive brand consideration (be it hotels or airlines) and increase social currency.



In Antarctica with #MyLifesATravelTribe, a group trip from travel influencer Alyssa Ramos.



Travel influencer Alyssa Ramos hosts a group to Cappadocia, Turkey.



15



TRAVELING FOR
'HIDDEN GEMS'

15 TRAVELING FOR 'HIDDEN GEMS'

The trend

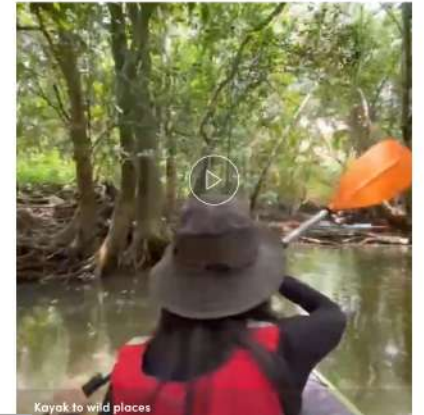
There's been a surge in independent experience sites like Seek Sophie, Singapore Airlines' Pelago and Klook which have a wider footprint for out of the ordinary experiences.

Klook is seeing over **300% quarter-on-quarter growth** in Asia-Pacific as of October 2022.

Travelers want to go beyond 'mass market travel' and find cultural nuggets that make the travel experience unique, memorable and personal.

The opportunity

Connect the 'not-so-touristy' traveler with off-the-beaten-path local experiences that are well-integrated within hotel and airline bookings.



Seek Sophie in Asia was founded on the principle to help travelers find 'hidden gems' through local operators on their platform.



16



DESTINATION INCOGNITO

16 DESTINATION INCOGNITO

The trend

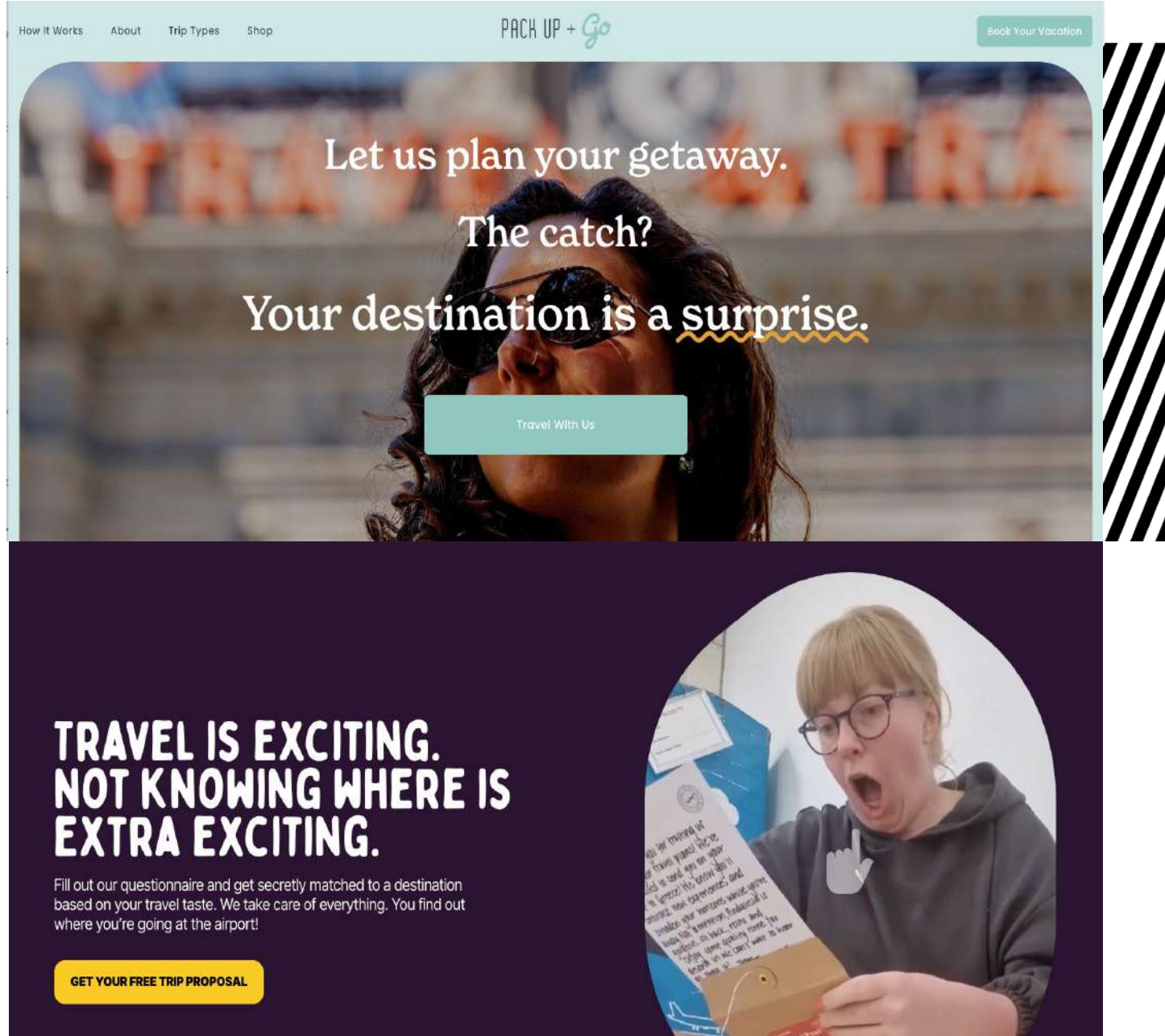
Decision fatigue is leading to a new trend in travel – mystery trips, where you leave your destination choice up to luck and chance.

46% Americans said a spontaneous trip felt more exciting.

The random trip craze even took Japan by storm where travelers on the West Japan Railway (JR West) used an app 'Saikoro Kippu,' which randomly selected a destination out of 7 stations to travel to.

The opportunity

Travel is exciting but planning can become tedious. How can we make travel feel more spontaneous and bring back the thrills we find in being a little less planned?



How it Works About Trip Types Shop

PACK UP + Go

Book Your Vacation

Let us plan your getaway.
The catch?
Your destination is a surprise.

Travel With Us

**TRAVEL IS EXCITING.
NOT KNOWING WHERE IS
EXTRA EXCITING.**

Fill out our questionnaire and get secretly matched to a destination based on your travel taste. We take care of everything. You find out where you're going at the airport!

GET YOUR FREE TRIP PROPOSAL

Source: European Sting, Skyscanner



TRAVEL

How do we experience travel?





17

CONSCIOUS TRAVEL



17 CONSCIOUS TRAVEL

The trend

Travelers are seeking “low carbon” modes of travel and are looking to use planet-friendly alternatives wherever time and money permit. Some European airlines are also increasingly promoting rail travel instead of short-haul flights.

In lieu of this green movement within the world of travel, France has chosen that any journeys that are possible in less than two-and-a-half hours by train cannot be taken as a flight.

The opportunity

Go beyond economic interest and get travelers to become more mindful of the mode of travel they choose especially when it comes to shorter distances.



Air France’s Train + Air partnership with French rail operator SNCF connects the airline’s Paris hub with at least 18 destinations across France, as well as to Brussels.





18

LUXE LIFE FOR RENT



18 LUXE LIFE FOR RENT

The trend

Hotels are increasingly going above and beyond to ensure their customer's needs are met. For example: traveling for weddings or long vacations could create a need for handbags, jewellery or accessories. Or even workout gear that one might have forgotten to pack.

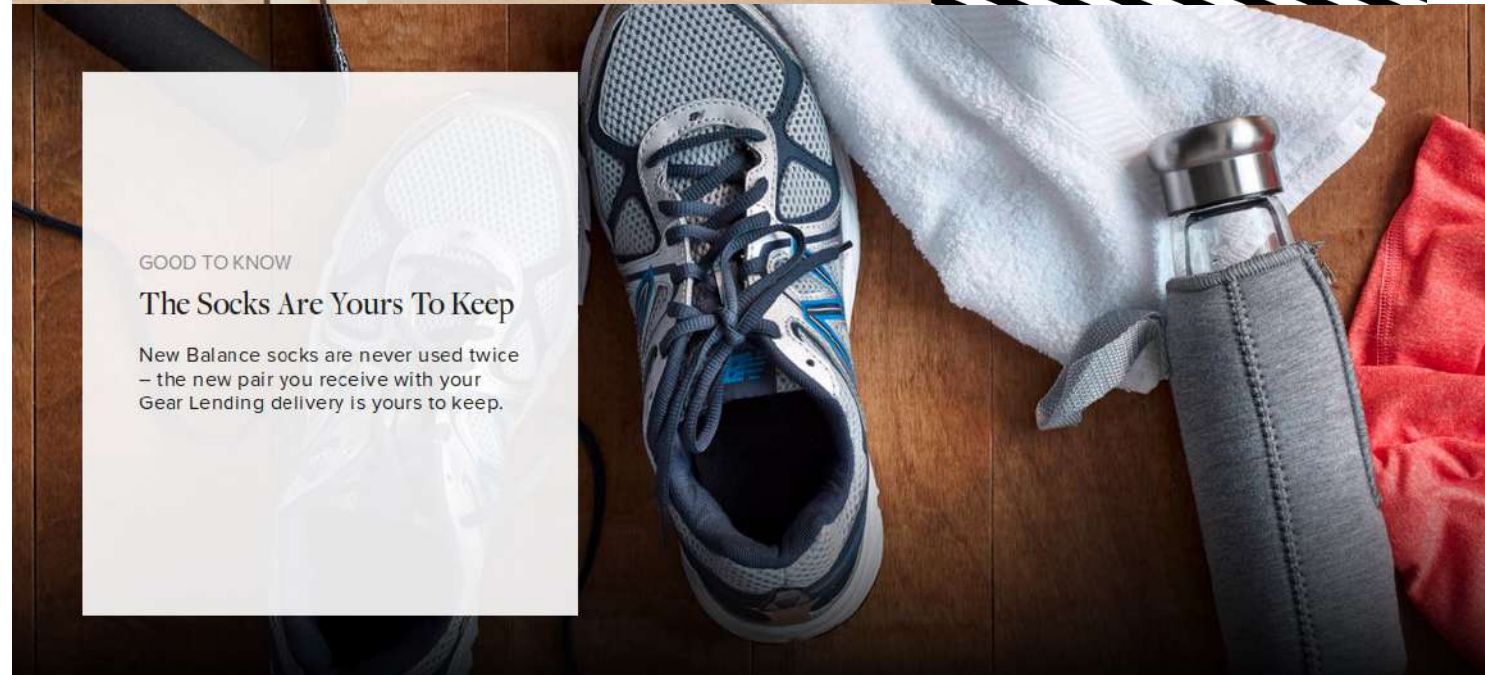
For the traveler who prefers to travel light - the rent life provides convenience and choice.

The opportunity

Being two steps ahead of the consumer's needs and requirements can enhance the overall travel experience and increase loyalty.



Luxury membership club Vivrelle announced a new partnership with the Four Seasons that allows guests to borrow designer handbags, jewellery, and diamonds when they stay at select properties, free of charge.



GOOD TO KNOW

The Socks Are Yours To Keep

New Balance socks are never used twice – the new pair you receive with your Gear Lending delivery is yours to keep.

Westin Hotels lets you rent workout gear through their Gear-Lending Program.



19



**FLAT PACK
YOUR HOTEL ROOM**

19 FLAT PACK YOUR HOTEL ROOM

The trend

Flat-pack hotels have been altering the hospitality industry for both tourists and hotel owners.

These are pre-fabricated, modular rooms that can be quickly constructed on-site. The building parts are manufactured in a factory, flat-packed and shipped to the destination to be assembled on-site. It's glamping 2.0.

The opportunity

Flat-pack hotels are potentially the solution to overbooking during peak periods. A concept like this can also be stationed in destinations that were hard to reach and build at.



Habitas, a new hotel brand is employing 3D-printing software and flat-pack functionality for construction of its hotel rooms.

This luxury concept is expanded into Saudi Arabia, Mexico, and Costa Rica.



20

INDIGENOUS IMMERSIONS



20 INDIGENOUS IMMERSIONS

The trend

A visit to an indigenous Shaman in a Maya village in Guatemala or a walk-through Queensland's Mount Barney National Park with a First Nations guide – travelers want to break out of the regular travel must-see lists and gain a better understanding of traditional ways of life and a destination's diverse legacy whilst giving back to the community.

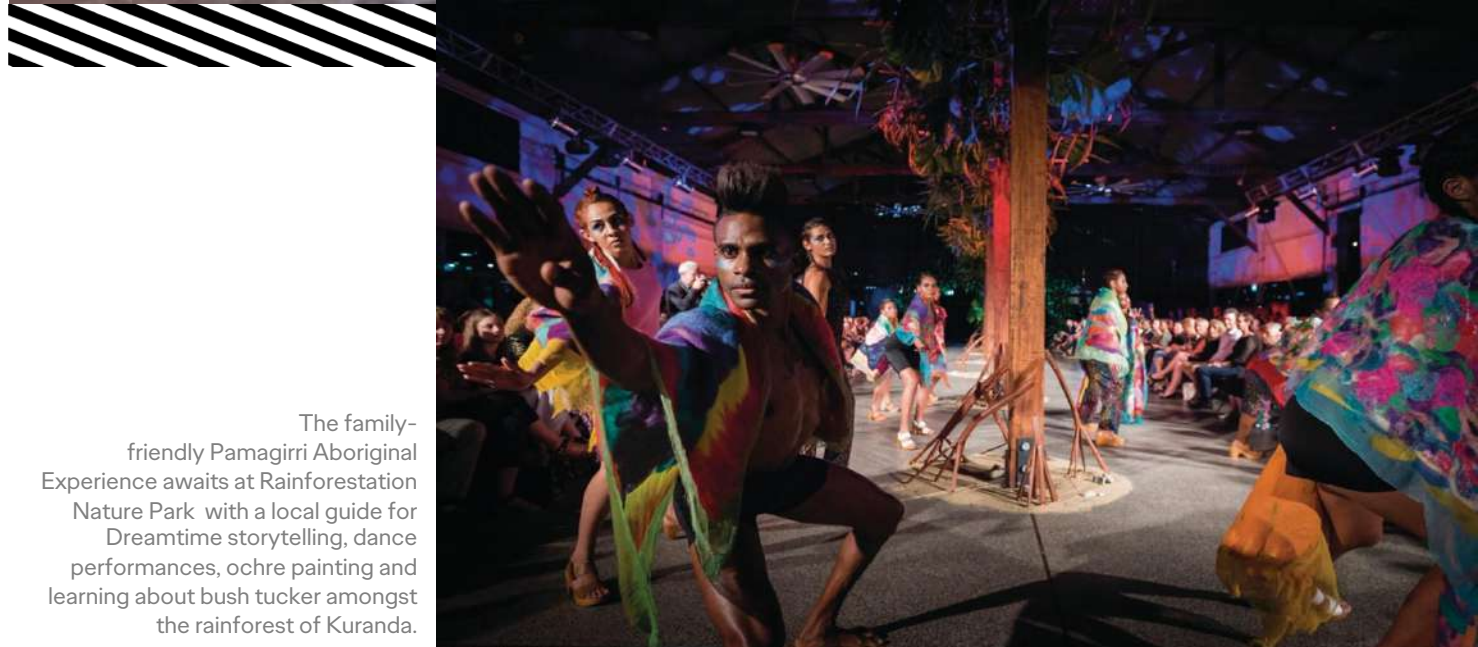
Consequently, indigenous communities are also inviting travelers by promoting their areas for culture preservation.

The opportunity

Empower community-led travel through collaborations to get more people to get back to their roots and culture.



One can now visit the modern-day shamans and watch them perform personal Mayan fire ceremonies for Shamanic Cleansing-Protection-Healing as a way of maintaining a spiritual life.



The family-friendly Pamagirri Aboriginal Experience awaits at Rainforestation Nature Park with a local guide for Dreamtime storytelling, dance performances, ochre painting and learning about bush tucker amongst the rainforest of Kuranda.

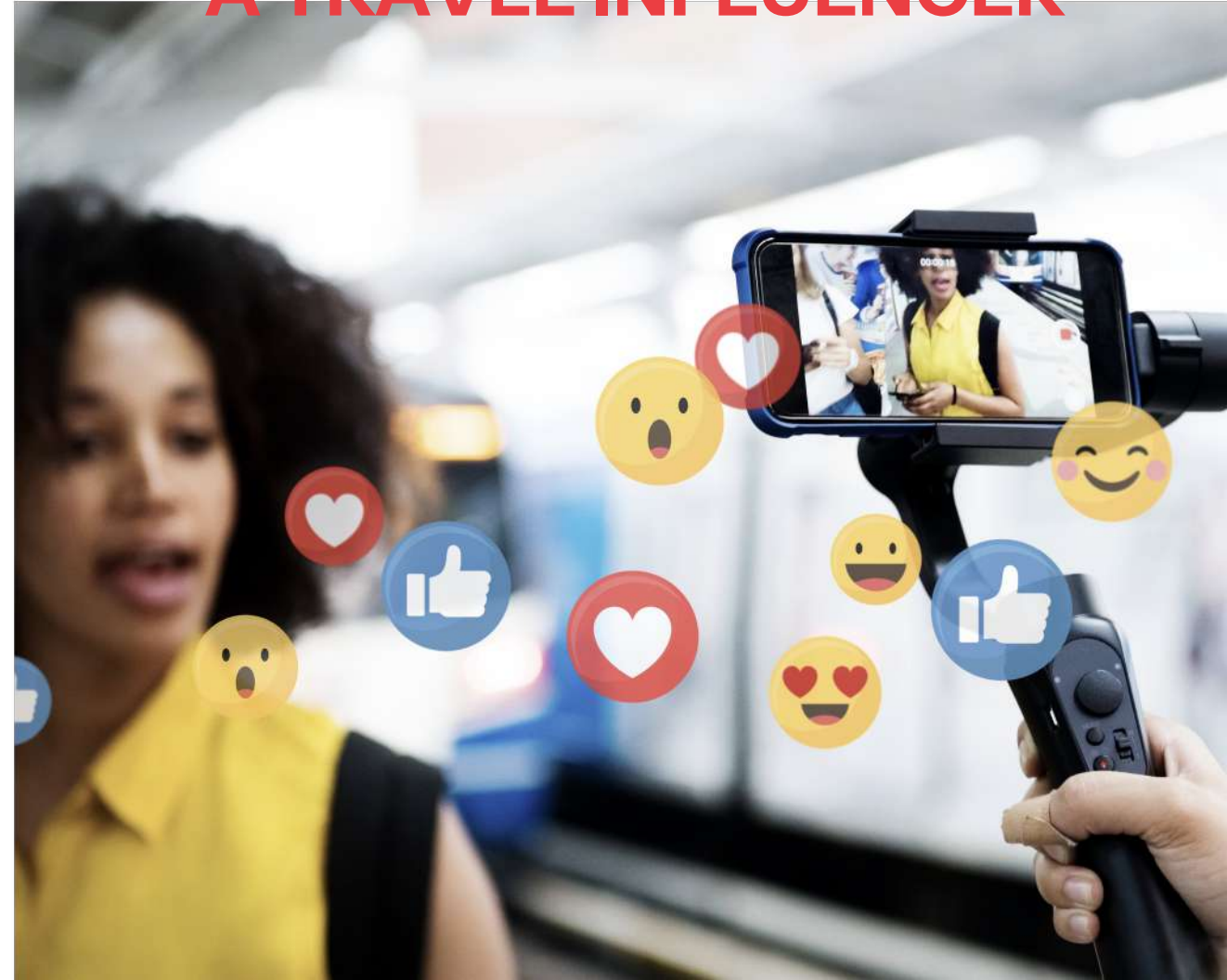
A photograph of a paved road winding through a dense, green forest. The road is illuminated with a blue glow, creating a sense of depth and movement. The trees are lush and vibrant, framing the road on both sides. The overall atmosphere is serene and mysterious.

SHARE

How do we experience travel?

21

EVERYONE'S A TRAVEL INFLUENCER



21 EVERYONE'S A TRAVEL INFLUENCER

The trend

The travel journey concludes only when you share it with the world. The rise of the holiday wrap reel serves as inspiration for millions of travelers deciding on where to go next.

85% say they will continue to post about their holiday fun, even after they get home.

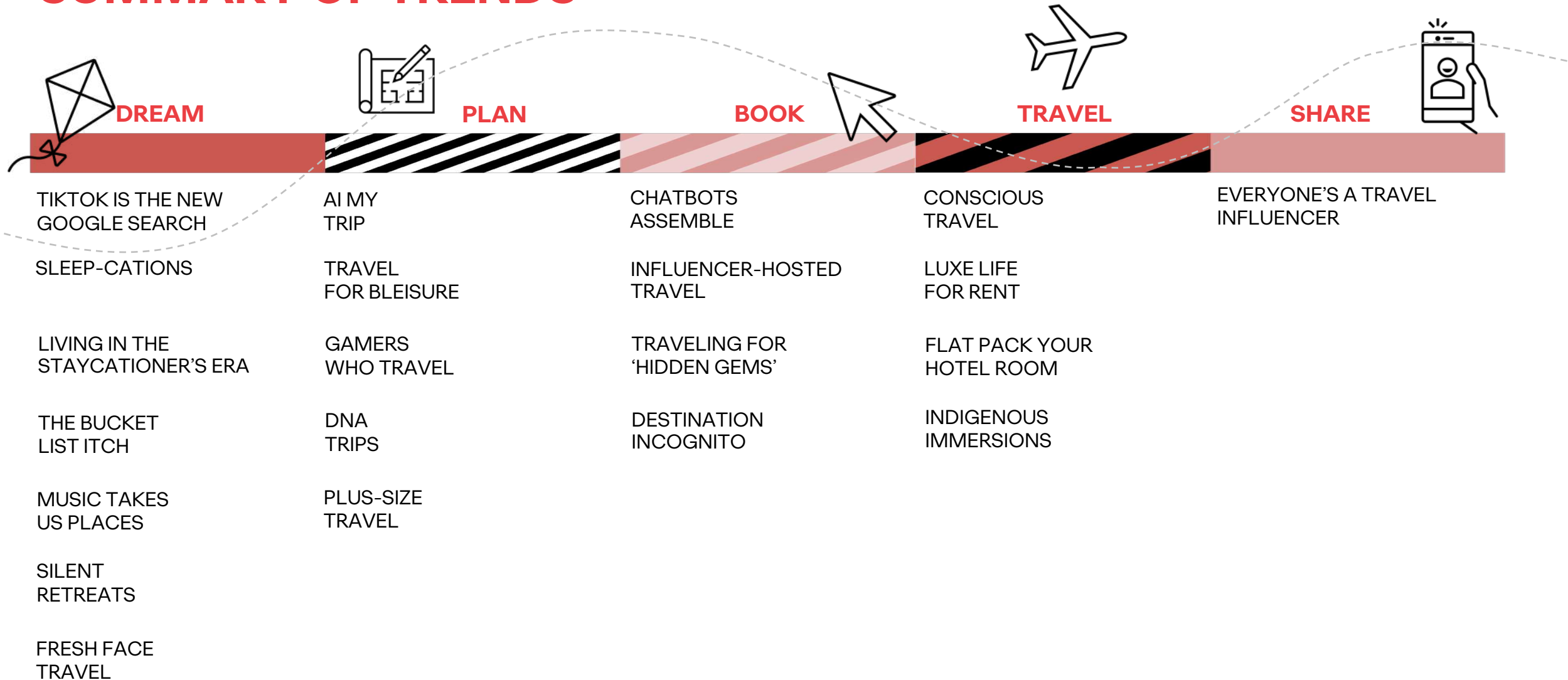
Travelers feel that publishing photos helps them evaluate and reminisce their trip better than keeping photographs for themselves.

The opportunity

Giving a traveler the best kind of experience will turn them into social advocates for your brand.



SUMMARY OF TRENDS



WANT TO KNOW MORE?

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Ogilvy