

A REPORT BY ETG

THE FUTURE OF IMMERSIVE TRAVEL

MARCH 2021

experience
TRAVEL GROUP



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Your views have always been key in shaping how we work. Now, with the drastically changing landscape of travel, knowing where you stand is more crucial than ever. So we have taken three sets of data to distil your views and provide an insight into the future of experiential travel. In this report, we're sharing our discoveries.

The three sets of data are: our 'Question a Day' campaign in which we asked ETG travellers for their views; a survey in

partnership with AITO, The Specialist Travel Association, that was answered by 20,000 luxury travellers; and insightful 'scans' on select members of the ETG community.

For context: while ETG clients are a diverse bunch, they are very much immersive 'luxury' travellers, meaning that they value experiences that enable them to connect with a destination. This report refers specifically to this kind of experiential traveller.

Ultimately, the aim of our research has been to discover whether travellers' values and attitudes have changed as a result of the pandemic. Are people seeking a different type of travel now compared to BC (Before COVID)?

Let's find out...

P.S. Thank you to everyone who has participated and made this report possible. We are grateful to have such a helpful, collaborative community.

CYCLING THRU
REMOTE VILL

TEA ON YO
BALCONY

WITH A GLORIOUS



Setting the Scene: Initial Insights



LONDONERS WILL BE THE FIRST TO GET AWAY ON HOLIDAY

Londoners seemed to have the greatest appetite for travelling soon, with 85% saying they would 'travel when the time is right' or be 'among the first to travel'. Other English regions were quite consistent with 81% in East Midlands, the North West and East of England and 80% for West Midlands, Yorkshire and the Humber and the South West.

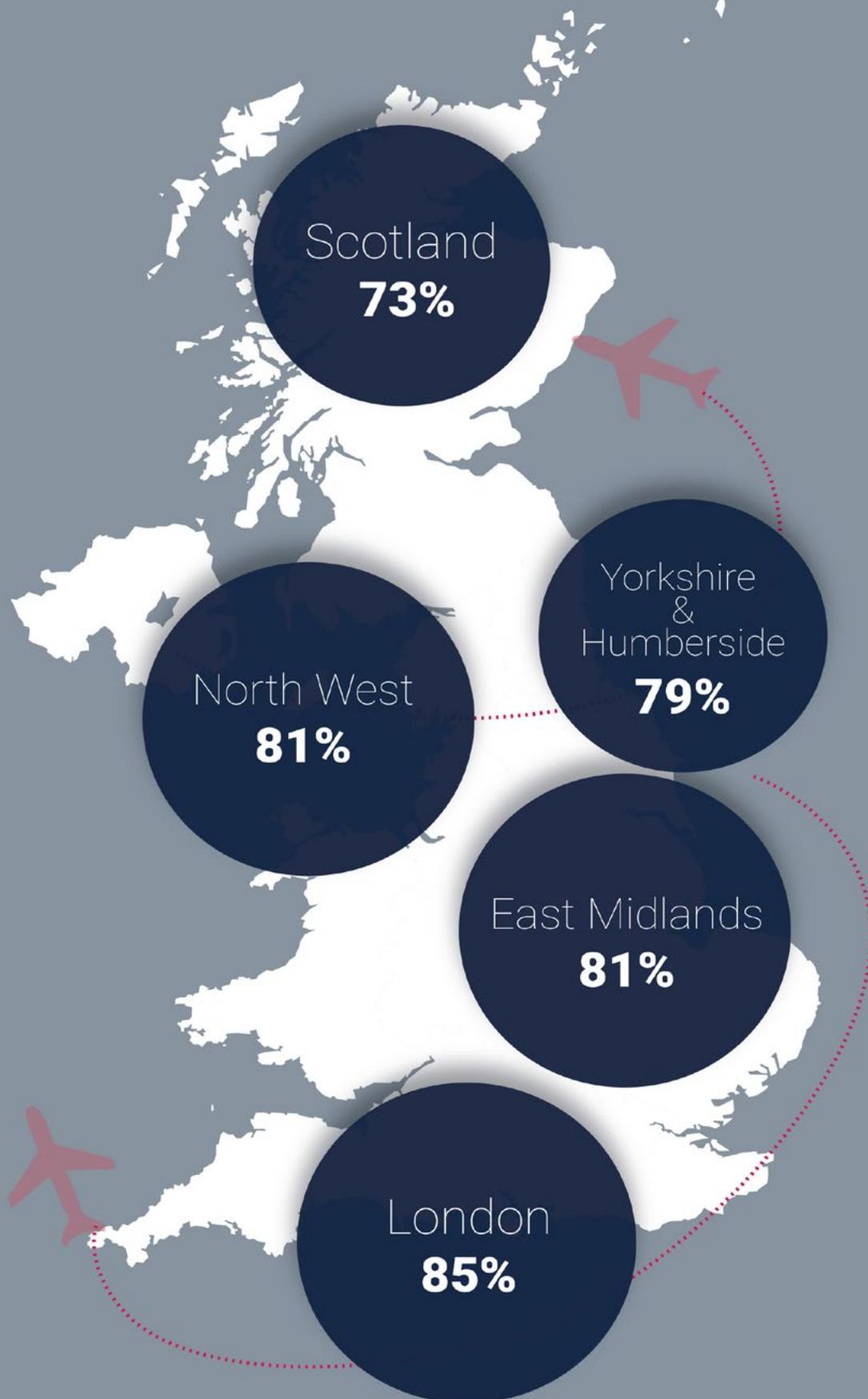
SCOTTISH PEOPLE WERE MORE CAUTIOUS

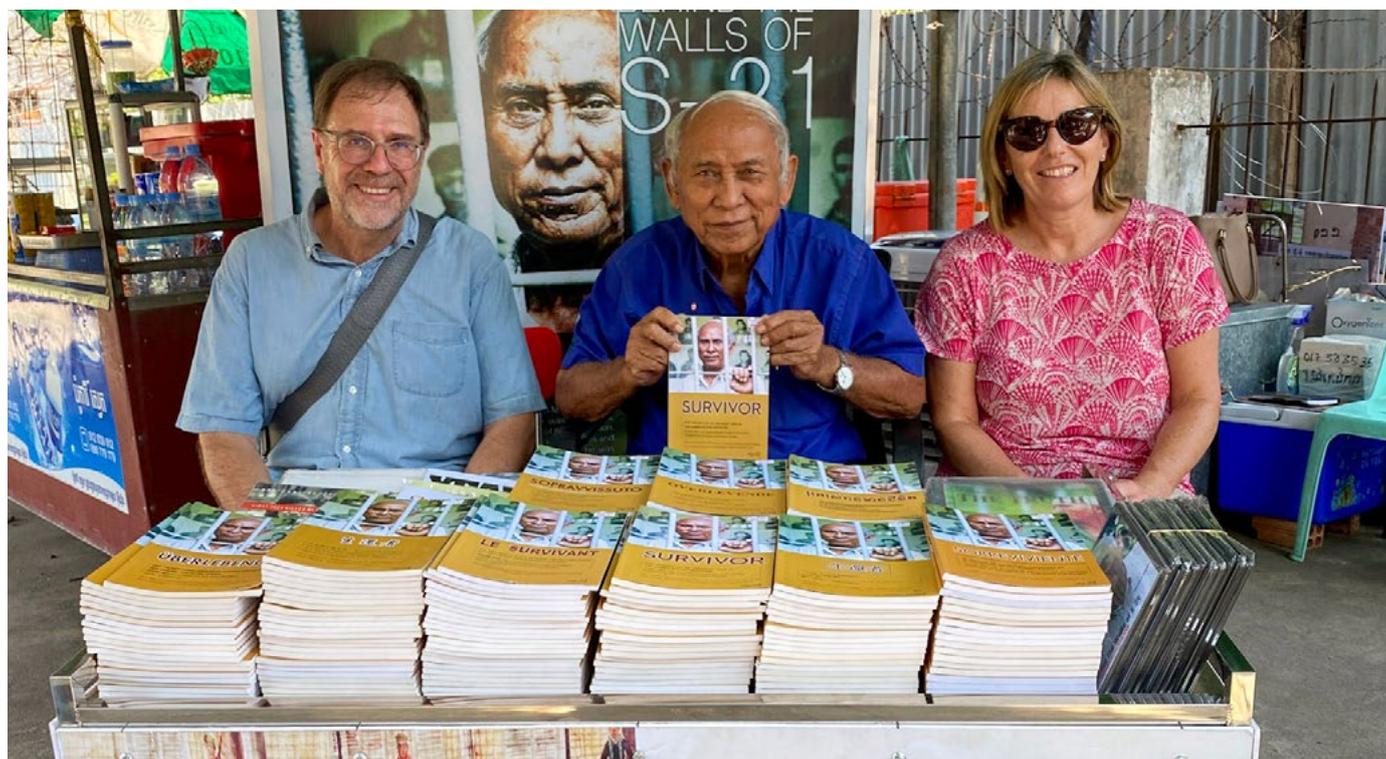
By contrast, among Scottish people surveyed, only 11% put themselves in the 'first to travel again' group. That said, Scottish people were equally as keen to travel once 'I know it's safe' so perhaps this simply reflects the more cautious messaging from Holyrood compared compared to Westminster.

How much do luxury & adventure travellers want to travel again following a year of lockdown-induced stress?

Very much so. In the AITO survey, 89% of respondents said that they would take the same or a higher number of holidays once travel was safe again. In fact, just over a quarter of these said they would take more holidays than before the pandemic. In some more good news for the world economy (tourism is estimated to account for 10% of world GDP), 23% of people expect to spend more on their main holiday than they did, while only 6% said they would spend less.

“ONCE THE TIME IS RIGHT, I’LL TRAVEL AGAIN”





THOSE AGED BETWEEN 50 AND 59 ARE SHOWING THE MOST APPETITE FOR TRAVEL SOON

Dividing the data by age we saw similar variation, but with certain surprising results. The assumption might have been that the younger respondents would be most keen, but the data did not quite bear that out.

According to the AITO survey, those aged between 50 and 59 were more likely to be early movers than any other age group (excluding those under 21): 85% of those in their 50's hoped to travel 'soon', compared with 80% of those in their 30's. Those aged 60-69 and 40-49 also showed more appetite for travel soon than those in their 30's, with 82% and 83% respectively.

THE OVER 70'S SHOW REAL DETERMINATION

Pouring scorn on last year's predictions that people over 70 would be permanently put off travel, 77% of people in the 70-79 bracket said that they would travel again. In fact, only 6% of those in their 70's said that they were unsure about travelling again. Perhaps surprisingly, this is only marginally higher than 30-39 year olds, 5% of whom answered, 'I'm unsure about travelling again'. We don't have any theories as to why such a comparatively high proportion of those in their 30's are taking a very cautious approach, but it's an interesting one to note.

This may well be an over-generalisation but, at ETG, we've always said that those aged 50 and above are extremely adventurous around their travel choices. Perhaps it's that people want to see the world while they can; perhaps it's a by-

product of kids having left the nest; it could be, as many travellers have told us, that they're making up for travels not taken in their youth. In any case, this data certainly seems to support what we've always suspected: that the over-50 age group have an acute sense of curiosity.





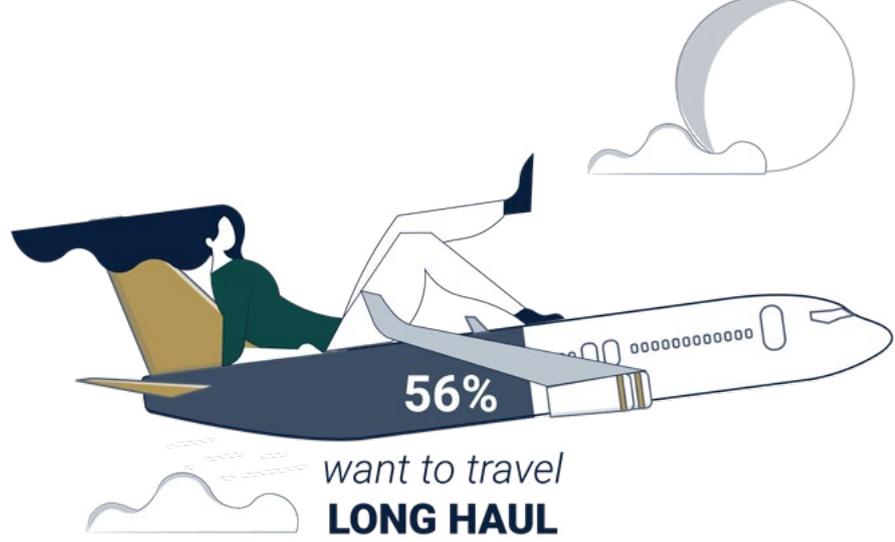
Making Travel Happen Again

TOPIC 1

It's clear from our research that the desire to travel remains high – but, understandably, there is still uncertainty as to when it will be possible.

Sadly, travel is not going to come back on like a tap. Though we are confident that certain destinations will open soon, in others there will be fluctuating regulations for a while to come. To overcome this, we have implemented robust measures to keep your money safe and put your mind at ease.

Here, we'll delve a bit deeper into the data on practical concerns surrounding travel, and the steps we've taken to mitigate them.



ONE

DESIRE TO STILL GO LONG-HAUL

Fortunately, and despite all the odds, the desire for long-haul travel remains. In the AITO survey, 56% of respondents said that they wished to travel long-haul in the next 12 months, while 87% said that travel is an essential part of their lifestyle.

This love of long-haul travel seems to hold true across all age brackets, too. To quote one of our travellers, “Flying long haul will never cease to excite me, despite being over 60.”

During our ‘Question a Day’ campaign, the sense of cabin fever among our travellers was strong. Phrases such as “straining against the leash” and “need to get back out there” were recurrent, and many said they would be happy to

go anywhere – whether it’s in the UK or Europe or further afield. As one traveller put it: “I will be the first to hop on a long-haul flight if I can. But will accept a short-haul holiday if long-haul is not possible... anything for a change of scenery and a bit of travel.”

In terms of popular destinations to return to, Southeast Asia emerged on top, followed closely by Sri Lanka and India. It is worth noting that, as an Asia tour operator, our audience largely has a prior interest in this part of the world... But we were still glad to see interest remains high!



TWO

THE VACCINATION PASSPORT CONUNDRUM

Many people had questions surrounding vaccines and whether they will become a requirement before travelling. While we cannot yet confirm this for certain, the travel industry expects that digital COVID vaccine certificates will play some role in international travel. Some countries may even make them mandatory, though we suspect they are more likely to be used as an option to avoid multiple testing regimes or similar. Certainly, airlines are giving every indication of being in favour and many destinations are desperate to open in a way that reassures their population. Should this come into effect, we will of course discuss the implications with every traveller.

“As far as destinations go, in the Middle East and Asia, and the day-to-day cultural experiences, hotels, restaurants, theatres etc that I have been lucky enough to enjoy on my travels, I think I would still feel safe today.”

Alison



THREE

PRE-DEPARTURE CONCERNS

Many travellers said that despite being very eager to get away, they have a ‘non-negotiable’ need that needs to be addressed first. Unsurprisingly, our survey showed that the most pressing pre-departure concern was whether vaccines would be mandatory. This was closely followed by quarantine and the availability of travel insurance.

There was a sense that travellers are seeking support when it comes to airports, PCR testing and the ins and outs of getting away. Responding to our ‘Question a Day’ campaign, one traveller wrote that they “need assurances that processes and checks are in place at airports and on planes”.

There is also a palpable sense of mistrust in the Government. As one traveller put it, “the way our Government handles things, I would hesitate to travel in case everything changed while we were away (and we found ourselves either unable to return or having to undergo a period of quarantine).”

“My fear is that airlines/countries won’t let you in without a vaccine, and what if we can’t get the vaccine before the summer holidays or whenever we can travel again?”
Anneke

“The vaccine gives me confidence and I feel really ready to expand my horizons. As much as I’ve enjoyed being home and finding new places in my region, I now feel really in need of getting back out there.”
Lesley



FOUR

SAFETY AND CONCERNS WHILST TRAVELLING AROUND

As part of our survey, we also asked travellers which in-country factors would be potentially off-putting. 'Restrictions on movement' and the 'feeling that tourists are not welcome' came up as top concerns, more so than wearing a mask or local vaccination rates. It seems, therefore, that the quality of the experience remains at the forefront of travellers' minds.

As one traveller put it, "More concern on restrictions and masks rather than safety. [I] hope that [we] can get out and about as before, [as we] want to be able to travel around to different sites with a personal guide."

We noted that 52% of respondents said 'definitely not' to the idea of travelling by coach, though by contrast, only 3% of people said that would 'definitely not' travel by air. Air travel is perhaps viewed as a necessary means to get away, while coach travel is an additional risk that is not worth taking.



What puts you OFF TRAVELLING





FIVE

ARE TRAVELLERS CHANGING THEIR BOOKING HABITS?

Our survey showed that 47% of respondents were equally as likely to book with a specialist travel company than before the pandemic, with a further 39% more likely to do so. This suggests that demand for reassurance and support when booking a holiday is higher than before.

In addition, getting value out of travel seems more important than the cost, with 77% of respondents agreeing that they would pay more for a better holiday experience.

There is a sense that there is greater trust around small independent companies than large corporations. As one traveller put it, “We were less sympathetic to some of the larger companies - in our case EasyJet, DFDS and Eurotunnel! They did not make it easy to cancel journeys which were no longer viable, issuing vouchers rather than refunds. Their instructions were not user-friendly nor were they easy to speak to in person - something that Experience Travel and the like do well!”



“We were lucky that we got back from India when we did, but I have no doubt that had we returned later and run into difficulties, ETG would have helped us out. I have always thought you get what you pay for. I hope and expect that you will continue to flourish and us oldies will return to foreign travel before the end of 2021.”
Liz



Making Travel Count

TOPIC 2

Our research shows that the pandemic has brought travellers' love of getting away and exploring the world into even sharper focus. The significance of travel in our lives has been cemented and we realise more than ever that it is not to be taken for granted. We are also more conscious of issues surrounding sustainable travel and making our trips count.

To that end, we know that when we do travel again, we want to be sure it's truly worthwhile. In this section, we'll explore the data on attitudes towards travel, the shift in interests and booking habits, and the increased demand for 'bucket-list' trips.

ONE

SIGNIFICANCE OF TRAVEL

In our survey, a massive 87% agreed with the statement 'holidays are an essential part of my lifestyle' (with 50% 'strongly agreeing'). We were delighted to hear that the pandemic had not compromised this passion.

The sense is that our travellers have always travelled and will continue to do so as long as they can. However, they are more acutely aware than ever of the privilege of their position. By and large, gratitude for trips taken seems to trump frustration at trips cancelled this past year.

"I feel quite trapped (still, who doesn't at the moment?!). I am really missing travel and I can't wait until I have the freedom and resources to go on a trip again."

Karen

"I think people who have travelled will always want to travel - importance hasn't changed. Travel was always important to widen horizons and add to the local economy."

Brian



"The trips we have done with your help have been profoundly life-enriching and I so hope to be in a position of doing such trips again. To get to that position wherein travel feels an exciting adventure from where we are today seems like a long journey indeed."

Tony

“We are more focussed, it’s less about ‘seeing the world’ and more about ‘Where do I really want to go?’... Positively grateful for the trips we’ve already had and feeling very sorry for the travel industry which has been hammered by this pandemic.”

Ailve

TWO

RECIPROCATION

Many people also touched upon the fact that travel is just as important for the global economy as it is on a personal level, expressing their concern for those in the industry who have suffered as a result of the pandemic. As one traveller thoughtfully put it: “I am sympathetic to everybody involved in the travel business from companies like you, to airport taxi companies, swimwear companies, Travel PR and marketing companies - the list of those impacted is endless.”

This highlighted that travellers see travel as reciprocal and recognise its positive impact on the world around them.



THREE

WHO ARE WE TRAVELLING WITH (OR FOR...)?

Travellers are much more likely to use their holidays to spend time with friends and family, with 49% of survey respondents saying they would prioritise seeing friends and relatives. After a year of enforced absence, this makes a great deal of sense and arranging a shared holiday is an amazing way to do this. One of our favourite ever ETG holidays was organising a huge family get-together in Sri Lanka, with parties coming from Canada, Australia, the UK, France and Singapore. They all stayed in a group of luxury, fully-staffed villas for a week of fun and connection, before heading off in smaller groups to explore the country in their own way.

“More important post-pandemic to visit family and friends around the world, use them as a base and organise travels independently.”

Bill



FOUR

ENVIRONMENTALLY AWARE

We were interested to see that 39% of respondents are concerned about their carbon footprint. This was supported by a number of quotes from our travel scans, in which travellers expressed sentiments such as “I would pay more on [the] basis it would be less damaging to the environment”.

At ETG, we think a great deal about our carbon footprint and how we can minimise the negative impact of travel and maximise its societal, economic and environmental benefits. To that end, you can read about our [carbon contribution scheme](#) as well as our more general [approach to sustainability](#).

“Longer travel – make it count, grasp the opportunity when you can – take the chance... Would pay more on the basis it would be less damaging to environment – pay more to make better/less damaging experience, with as little harm as possible”
Steph

We were also glad to see travellers touch upon how travel can positively impact other elements of sustainable travel, such as wildlife conservation. To quote one traveller: “One of the most poignant articles I read was how poaching had increased in national parks in Africa because the tourists were no longer there, [which] made it much easier for the poachers to operate. I assumed wildlife would benefit from lack of people but not necessarily so. Therefore, tourism can be beneficial in more ways than one.”





FIVE

BUCKET LIST DESTINATIONS COMING TO THE FORE

It appears there is a definite trend of travellers seeking bucket list trips. The knowledge that holidays can be snatched away from us seemed to instil a sense that it's important to seize the moment, make your holidays worthwhile, and explore the world when you can.

This could be in the shape of pushing their comfort zone: for example, 22% of respondents to the AITO survey were more likely to do a remote, wilderness style holiday than pre-pandemic.

One theme that emerged was that travellers had a handful of destinations in mind that they really wanted to go to. In the words of one traveller, 'I cannot wait to cross the bucket list destinations off my dream sheet. Still a few to go. Mongolia, Canada, Svalbard and Scotland! I am ashamed that in 54 years I have never been to Scotland!'

"For me it would be Bhutan, twice cancelled. I've not been to India. It is on my 'Must-Do' list, [though] as a solo traveller it does frighten me... I would love to visit [and] get a feel for its people, culture and history. Perhaps I could tag it on to a trip to Bhutan. Or do two separate trips and stay longer in India. There's a thought."

Sarah

"To pick anywhere I would choose Tanzania for its plethora of diversely beautiful national parks. In ETG neck of the woods, it would be India. I have been 3 times so far and could go back 100 times more to see many new wonders and have great experiences with the most friendly of people."

Emma





Step Away From The Everyday

TOPIC 3

But when we do travel again, what will those trips look like? Will we go short-haul or try to flee as far as possible? Have our interests fundamentally shifted as a result of the pandemic? Are we seeking a rest or a re-invigorating adventure? Ultimately, when we are once again able to 'step away from the everyday' - what will we be stepping into?

Again – let's look to the data for insights...

ONE

LOCATION, LOCATION, LOCATION

It's clear that travellers are pinning a lot of hope on that "first holiday back" when we are once again allowed to travel. But which destinations are at the top of our lists?

It seems that many want to dip their toe into a short haul getaway over the summer before considering a long-haul adventure: in the AITO survey, usual suspects like France, Spain, Italy and Portugal emerged as most sought-after destinations.

However, there was a real sense that it was the quality, not the quantity, of future trips that

mattered most. Some travellers seemed to indicate that they would happily take fewer short haul trips overall if they could have more enriching experiences.

There also seemed to be a trend towards people seeking to return to a previously visited location, rather than trying somewhere new. Perhaps it's the upshot of a year of uncertainty? As one traveller put it, "We are more focused. It's less about 'seeing the world' and more about 'Where do I really want to go?'"



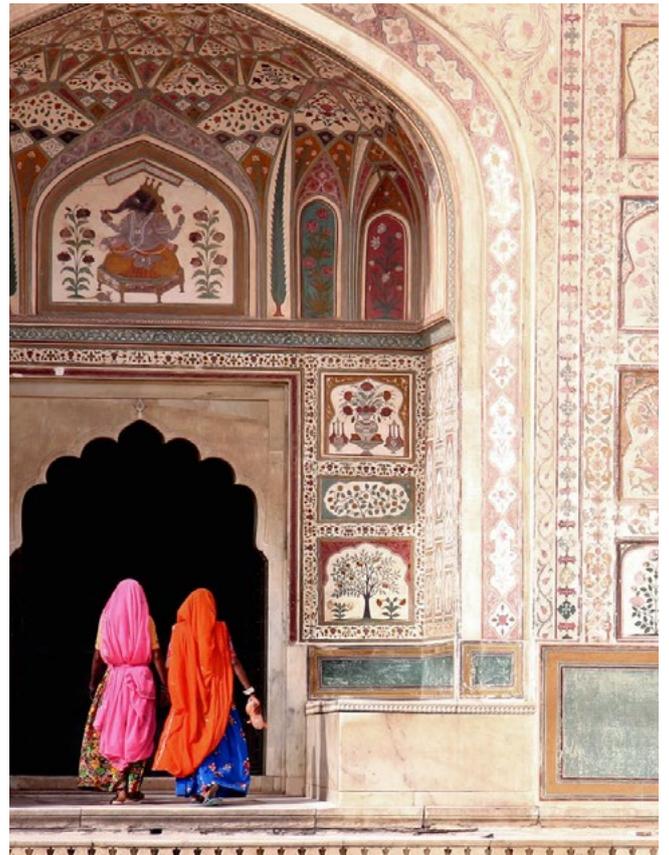
"During this year I am hoping that by mid to late Spring, the vaccine will have produced significant reductions across Europe and the wider world and that careful steps can be taken to travel once more. In June, I should be travelling to Umbria for the wedding of my nephew, postponed from last year - I really hope for their sakes that this is able to go ahead. Perhaps in late summer I might contemplate a river cruise in Europe. I probably won't travel beyond Europe this year but perhaps in 2022 this might be possible and I have a friend in Sydney who I know would welcome a visit."

James

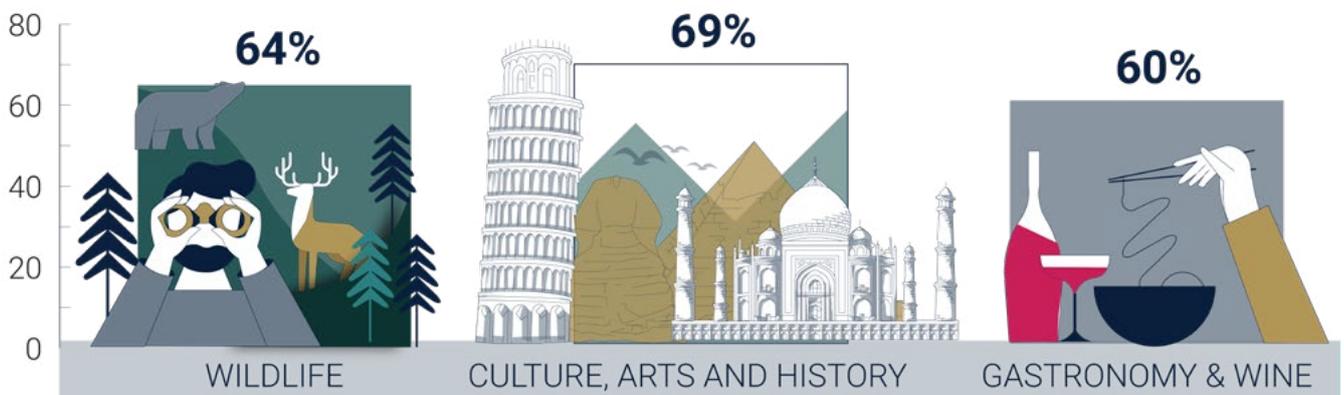
TWO

EXPERIENCES FUNDAMENTALLY CHANGED?

While some noted a desire to avoid crowded places, our studies showed that what people want to experience on holiday remains similar to previous years. As ever, the big three given as potential ‘main focus’ of a holiday were exploring culture, arts and history (69%), wildlife (64%), and gastronomy and wine (60%). The majority said they would feel confident doing an independent walk around a cultural sight - no mention of hermetically sealed bio-bubbles or other such visions of post-pandemic travel! And, hearteningly, most travellers are also willing to visit an indoor food market – a sure sign that COVID-19 has not altered our interests too drastically.



What people want to **EXPERIENCE ON HOLIDAYS**



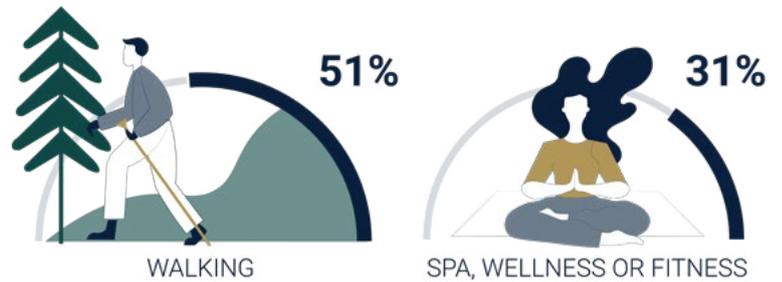
**NEW FOUND
HOBBIES**
brought into
FUTURE HOLIDAYS

THREE

TAKING LOCKDOWN HOBBIES TO THE HOLIDAY

However, there have been some notable travel trends inspired by changes of the past year. For example, reflecting new-found walking habits formed during the recent lockdowns, 51% of survey respondents said they were more likely to introduce walking into their holidays post-pandemic.

This was backed up by our ‘Question a Day’ campaign – quotes like this might sound familiar to you by now: “We have certainly explored more of our local area... [and] found many new tracks and trails that we were not aware of even though they were so near.”



Similarly, yoga saw an increase of interest, with 20% of survey respondents saying they’d like to introduce the practice into their holidays. We all know someone who got into yoga during lockdown – as one of our clients said, “In the absence of usual tennis exercise... I found myself doing yoga 4/5 times a week - good for the mind as well as the soul!”

In addition, 31% of respondents said that they were more likely to bring spa, meditation or wellness treatments into their holidays, indicating a desire for relaxation that makes total sense after such a year of uncertainty.



“Always a keen walker, we have walked our local streets and parks so much that I could probably draw a map from memory now!”
Anne-Marie

“We have been extra active, walking, cycling, golfing all within our area, our garden has had lots of TLC and returned us veg for the first time in 30 years. We consider ourselves very lucky, but miss the trips that should go with retirement.”
Doug

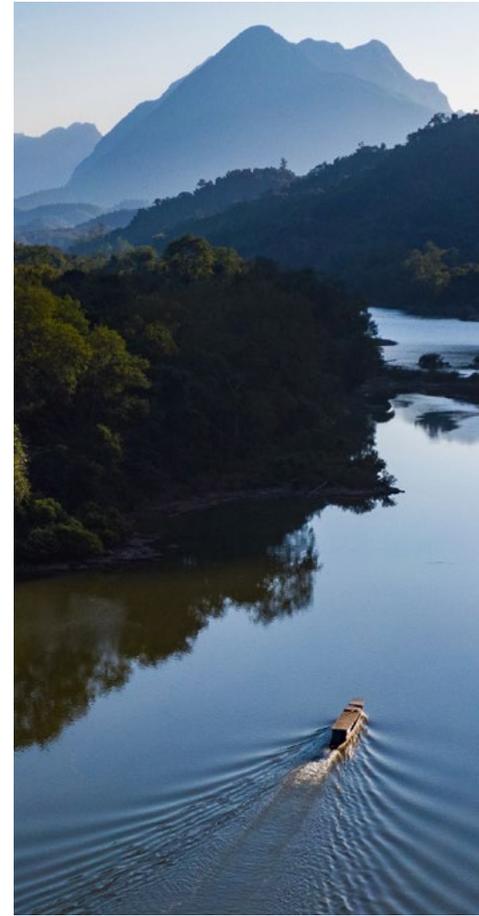
FOUR

SLOWED DOWN TRAVEL

Slow travel has been a brewing trend for a while, and now it seems cemented: a significant 75% of survey respondents said that they were equally or more likely to slow a holiday down post-pandemic. The focus here is on less transit in-country, especially when it comes to flights, and using unique forms of transport – for example, is there a boat journey instead of a car?

We have long been banging the drum for this kind of travel, believing it to be better for the environment as well as leading to a more enriching travel experience. Long may it last!

In response to the evident shift in the way we travel, ETG launched our [Revitalise Collection](#) which we think is squarely on these trends. Each of the 18 holidays features just two stops in a single country, in various destinations across Asia (including Sri Lanka, India and Indochina). The idea is that by choosing the right hotel in the right location, you can still experience the magic of a country, without the need to rush around and tick all the boxes.



FIVE

GUIDES AND CONNECTIONS

As part of our 'Question a Day' campaign, we asked people which person from their travels they would most like to see again. We asked this because we know that our travellers explore the world to make connections, and that these often last long after the trip is over. Your answers confirmed just how important these connections are.

Most travellers referred to a guide that had made their trip extra special. Here is one example of a story we loved: "The person I would like to see is Anji, our driver and guide from our holiday in Sri Lanka last year... We often think

of him and hope he and his wife and family are ok. When we were in Sri Lanka, we bought a wooden elephant as an ornament and had it sent home. It now stands in our sitting room and we have named it Anji."

We have long believed in the power of a brilliant guide to transform a trip. Now, more than ever, having someone there to bridge the gap with locals, to help with cultural and language barriers, to steer you to less crowded spots and to help you out with anything you need along the way, seems more appealing than ever.

LOOKING TO THE FUTURE

WE'RE IN THIS TOGETHER

You've now read a lot of statistics, research and insights. But here, to sum up, we're going to re-iterate one number that feels particularly relevant: 87% of travellers say that travel is an essential part of their lifestyle - even despite the pandemic.

It's clear that demand for travel remains high. But we all have our own definition of what is "safe" and when we'll be "ready". For some, it's a case of waiting for the vaccination roll-out to be complete. Others will dip their toe into short-haul travel now, long-haul later. And there are those who will approach travel with renewed vigour, no longer putting off bucket-list trips because they're waiting for 'the right time'.

Elements of travel will have to change, too, though in many ways it's for the good. Slow trips, with fewer stops and less transit, will likely take off in a big way – and this style of travel is not only more COVID-secure, but allows for greater connection with the destination (and less environmental impact). Considering why we travel will be more crucial than ever, so that we make our travel experiences truly count.

We don't know exactly when the entire world will unlock. What we do know is that travel will come back, and that when it does, we will be here to help you navigate these strange new waters. Excuse the pun... But we're in it for the long haul!



CREATING THIS REPORT

OUR SOURCES AND CITATIONS

AITO SURVEY

In January 2021, we shared a survey among our client base in partnership with [AITO, The Specialist Travel Association](#). This survey had over 1,000 responses from the ETG community. At the same time, AITO shared a wider survey which received over 20,000 responses.

All data in this report is from the smaller ETG survey of 1000 respondents. However, we have used results and themes from the wider survey to support our findings. You can find out more [on our blog](#).

'QUESTION A DAY' CAMPAIGN

In December 2020, we ran a campaign in which we asked our community 6 unique questions about travel, past, present and future. Over 500 of you took part, delving into diverse topics from your favourite travel memories, to habits that may have changed over lockdown.

We received over 1000 individual emails in response. Your feedback was extraordinary, and we were delighted to be able to continue the conversation around travel in such tricky times.

TRAVEL SENTIMENT SCANS

A travel sentiment scan consists of a personal conversation between a travel consultant and an ETG client, in which the client shares their concerns and hopes for future travel.

So far, 40 people have been 'scanned' and we're very grateful for their participation. Thanks so much to everyone who has taken part and to Sara, Holly, James and Nick of ETG HQ for bringing the scans to life. We believe strongly that we are a community of travellers – and projects like these really show why.



EXPERIENCE TRAVEL GROUP

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