



zicasso

Zicasso 2024 Travel Trends

The Luxury Travel Report

About Zicasso

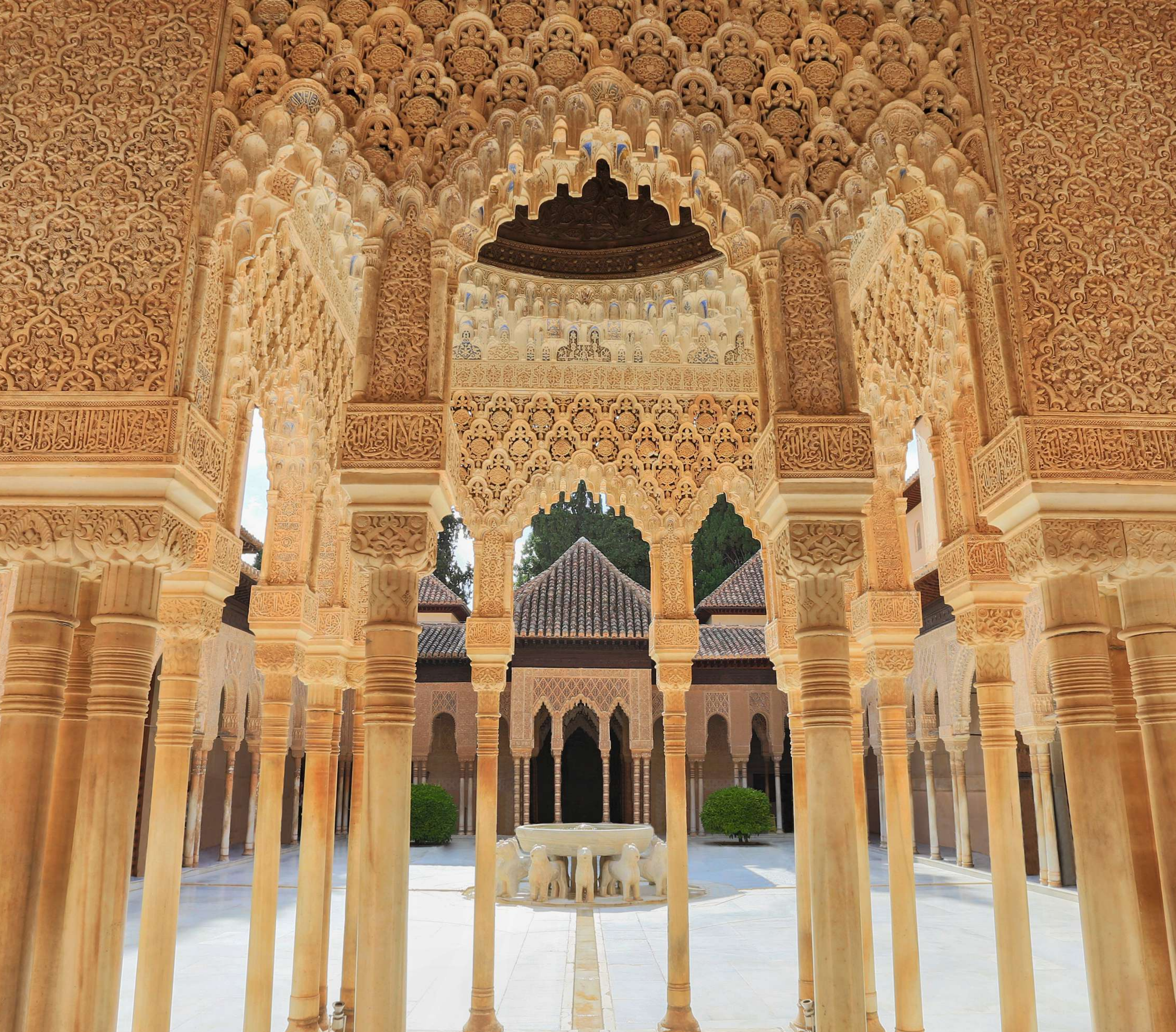
Since 2008, Zicasso has been a leading luxury travel company, fulfilling personalized, life-enriching vacations for hundreds of thousands of international travelers. Zicasso curates and connects travelers directly with our team of in-country specialists who bring deep destination knowledge. This network represents the top 10% of luxury travel advisors in over 100 countries.

By connecting travelers with trusted travel advisors, Zicasso simplifies vacation planning for busy, discerning clients. We listen to our customers' trip ideas, needs, and desires, and create fully customized itineraries with unique and authentic travel experiences for each trip.

To ensure the highest quality and value, our travel advisors are continuously vetted by Zicasso using a rigorous screening process and ongoing ratings by real Zicasso travelers. We have over 23,000 5-star reviews and an average 4.9 rating.

For more information, visit www.zicasso.com or contact us at pr@zicasso.com





About This Report

Nov 15, 2023

We analyzed the data from nearly 40,000 trip requests for information on specific interests, activities, and destinations. We also mined thousands of verified Zicasso reviews to ascertain highlights, key in-country findings, and momentum heading into 2024.

In addition, we performed a detailed survey of 200 of Zicasso's key in-country specialists on traveler and trip details in 2023, as well as the trends they are seeing for planning and bookings in their regions in 2024.

The Zicasso Luxury Traveler

Accessible Luxury

The Zicasso traveler has a household income floor of \$200k and up. They fit into several segments from working couples, retirees and near-retirees, families, multi-generational families and, significantly, friends traveling together in small and large groups.

While we handle many trips priced over \$100k, the bulk of our travelers spend in the \$6000-\$7000 range per person, for an average vacation duration of 11 days. As such we provide “accessible luxury” for our audiences with exceptional, memorable experiences.

For our travelers, this means upscale, primarily boutique accommodations, extraordinary amenities, and custom-tailored vacation experiences that go well beyond conventional travel standards. Zicasso travelers expect an enhanced level of comfort, personalized service, and exclusivity.

The luxury traveler also prioritizes authentic cultural and local culinary experiences – they feel that local cultural immersion enriches their travel experience. Our travel specialists love delivering in these regards, sharing unforgettable tours and activities while customizing tours that both pique the curiosity of Zicasso’s clientele and surpass travelers’ expectations.





Overview of Key Findings

- Increased interest in both traditional European destinations and unique, exotic locations
- Rise of shoulder and low season travel in an effort to avoid peak season crowds
- Rise in multi-generational family vacations, and a focus on quality, customized experiences

Our detailed analysis of the evolving travel industry revealed key findings that include the sustained growth and momentum of international travel during the summer. **Travelers have an increased interest in both traditional European destinations and newer, exotic locations.**

Travelers are also favoring shoulder and low-season travel for authentic experiences, exploring unique places within popular countries, **and avoiding the large crowds of the conventional peak seasons.** Instead of the traditional destinations and places within them, many **travelers are further expanding their trips to venture off-the-beaten path.** This is true within popular countries such as Italy, with more travelers choosing to visit regions like Puglia and Umbria, as well as with less-discovered European destinations like the Pyrenees Mountains, in addition to more far-flung locations like New Zealand, Australia, and various African safari destinations.

There is an expected stabilization in destination preferences, **a rise in multi-generational family vacations, and a focus on high-quality, personalized experiences.** These insights are crucial for Zicasso and its partners to adapt to evolving traveler preferences and continue offering exceptional custom-tailored trips.

US Luxury Travelers:

Most Visited Countries



The list of top visited countries is quite consistent year over year. Below are the countries that Zicasso’s luxury travelers visited most in 2023, ranked in order. When looking at trip requests already made for 2024, however, we do see some shifts, notably down under with New Zealand gaining 5 spots in the ranking for most popular destinations in 2024 vs. 2023, and Australia moving up 7 spots.

2023 Zicasso Ranked Trip Requests

Italy	
Greece	
Spain	
France	
Portugal	
Iceland	
England	
Japan	
New Zealand	
Switzerland	

2024 Zicasso Ranked Trip Requests

Italy	
Greece	
Spain	
New Zealand	▲ +5
France	▼ -1
Japan	▲ +2
Portugal	▼ -2
Australia	▲ +7
Iceland	▼ -3
England	▼ -3

It is noteworthy that Japan, New Zealand, and Australia were some of the later countries to fully reopen to travelers after COVID. Japan fully reopened to travelers on October 11, 2022, after more than two years of closed borders. New Zealand and Australia fully reopened on August 1, 2022 and February 21, 2022 respectively, after a phased reopening process. They are hitting their travel stride again.

Also noteworthy that just outside of the top 10, trip requests in 2024 have so far taken a large jump for Scotland at +4 and Africa (safari countries) at +8. Italy, Greece, and Spain, however, remain rock-solid locks for the top 3!

Traveler Types

Dominated by Couples & Families

Zicasso's travelers are mainly couples, whether one couple or more, comprising 43% of clients. Families are a close second at 40%, with friends at 12% and single travelers at 5%. Solo travelers had the longest trips on average, followed by couples. Families took the shortest trips by a narrow margin.

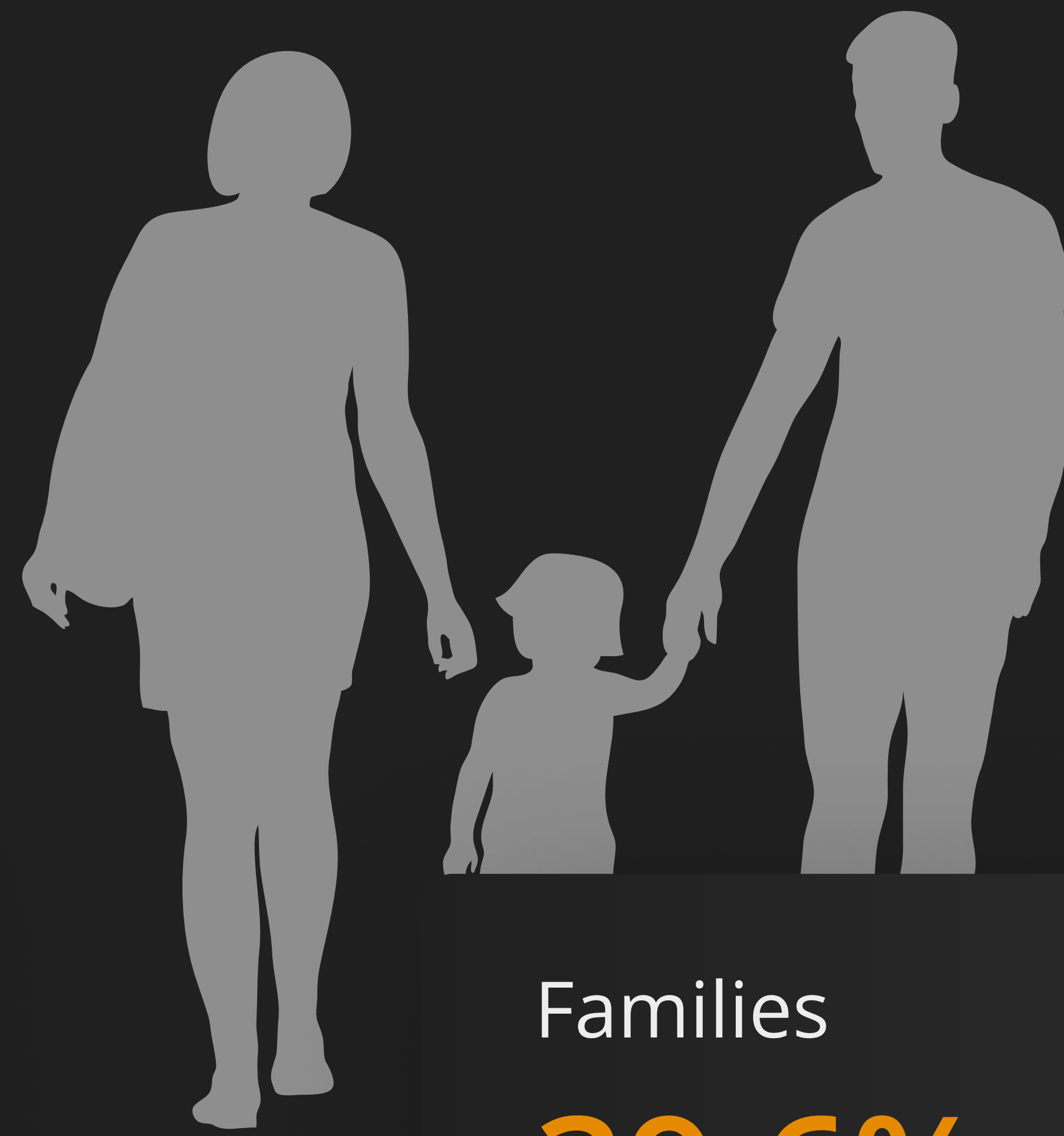


Couples

42.9%

Average trip duration

11 days

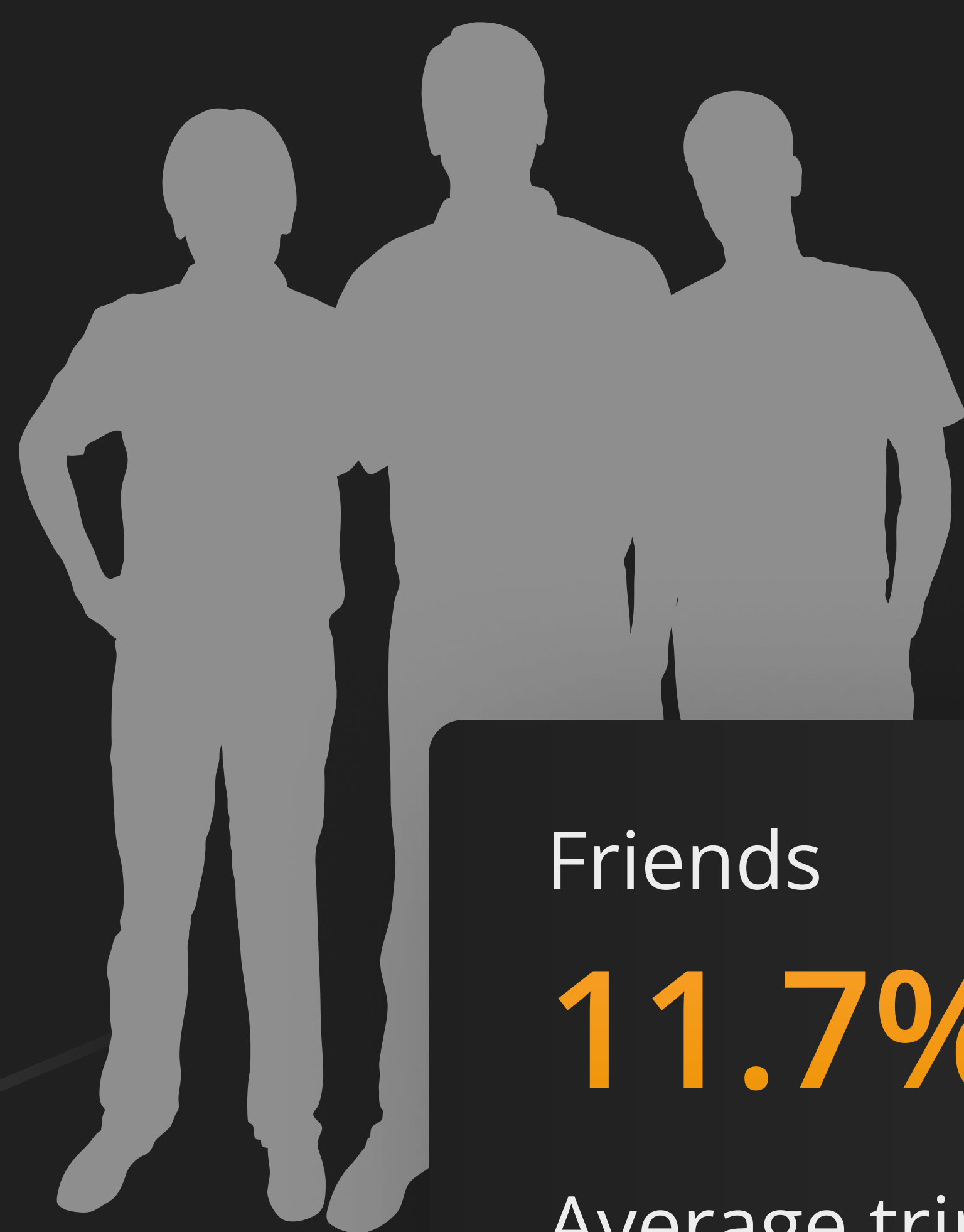


Families

39.6%

Average trip duration

9.9 days



Friends

11.7%

Average trip duration

10.6 days



Solo

5.8%

Average trip duration

12.4 days

Traveler Buying Trends Post COVID

Increased demand plus inflation driving price increases surpassing pre-COVID.

2019

Traveler
Budgets

100 (Index)

Days Between Trip Request
and Departure

170.8

2020

COVID

Traveler
Budgets

94.7

Days Between Trip Request
and Departure

181.2

2021

Traveler
Budgets

96.8

Days Between Trip Request
and Departure

183.3

2022

Traveler
Budgets

105.9

Days Between Trip Request
and Departure

165.3

2023

Traveler
Budgets

118.0

Days Between Trip Request
and Departure

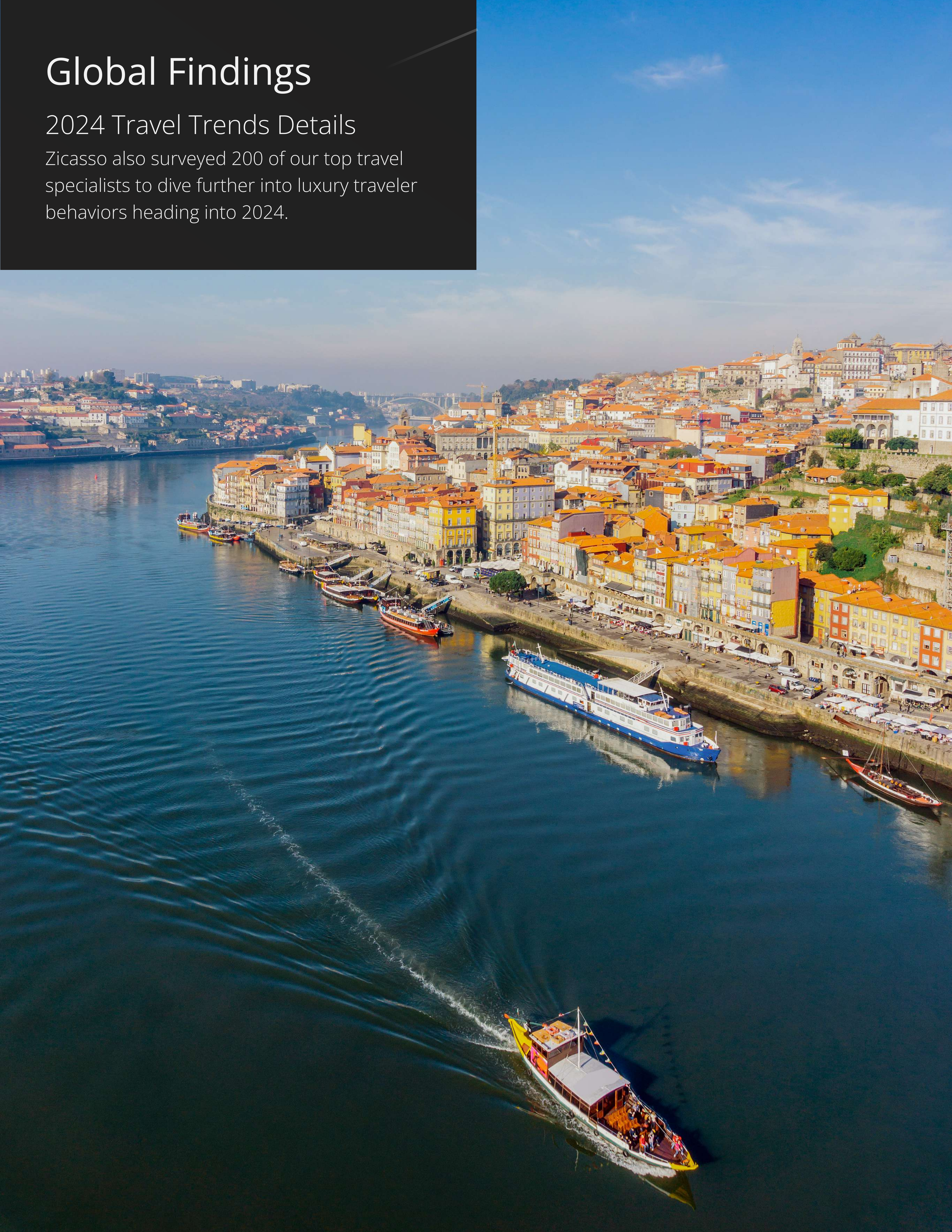
156.1

Traveler budgets have swelled 18% vs. 2019, after dropping post COVID. The time between initial Trip Request and Departure Date has shrunk significantly in this same period.

Global Findings

2024 Travel Trends Details

Zicasso also surveyed 200 of our top travel specialists to dive further into luxury traveler behaviors heading into 2024.





Stability in Destination Preferences

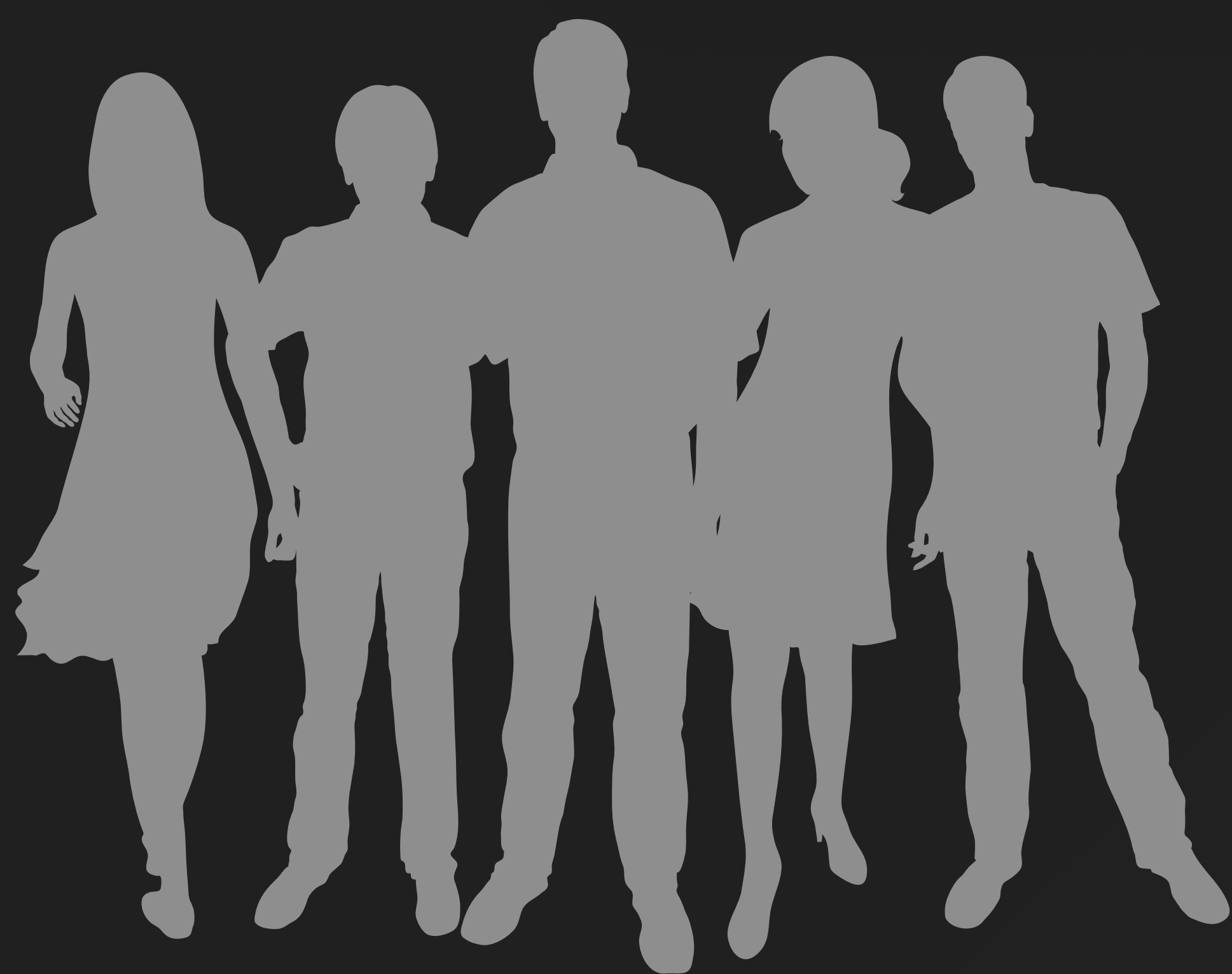
86.89% of partners reported few changes in the most frequently requested destinations since the previous year. Travelers continue to favor traditional, popular destinations, as noted in this report's first chart comparing 2023 and 2024.

Changes in demand among different traveler types



Multi-Generational Families

28% of respondents cited an increase in multi-generational family travel. Families are looking for accommodations and activities that cater to a wide age range, and this type of travel has gained popularity. We saw this trend post COVID and it has continued – families are eager to spend meaningful time together across generations, and international travel creates lifelong memories.



Groups of Friends

16% noted an increase in groups of friends traveling together.



Families with Young Children

9% of responses indicated a rise in travel requests from families with young children. This suggests that families with young kids are actively participating in travel, and they may have unique preferences and needs compared to other traveler types.

Most significant obstacle preventing people from booking

51%

of respondents say Overall Cost and Inflation

Even with the Luxury Traveler audience, many are paying attention to overall costs. Travelers cite market unsteadiness and inflation as considerations in the type, duration, and extravagance of travel booked. And our in-country travel specialists note feedback that the rising cost of travel, including accommodations, activities, and general expenses, is definitely part of the pre-booking conversation, and can be a deterrent or alter the type/timing of travel.

31%

of respondents say International Flight Costs

Similar to above, higher flight costs may deter potential travelers from making bookings. This also pushes some travelers into shoulder and low seasons for more bang for their buck. That said, the Wall Street Journal (11/6/2023) noted that increased carrier capacity across the Atlantic, responding to 2023's heightened travel, may result in some lower pricing in 2024.

18%

of respondents say Geopolitical Conflict

Several respondents highlighted concerns related to geopolitical instability as a factor preventing people from booking. Uncertainty and safety issues in various regions may discourage travel plans. Travelers are also looking for different destinations away from potential hot spots. (This survey was taken after the regional conflict in the Middle East had begun capturing headlines.)

Unusual seasonal patterns for travelers

The trends suggest that traditional notions of high, shoulder, and low seasons are evolving. This is not a shock because of the sheer volume of travelers the past two years – summer 2023 saw record bookings in many destinations favored by tourists. While supply/demand means prices can surge, it can also mean more crowds, not to mention summer 2023 saw uncomfortably warm conditions in certain regions.

41%

of respondents noted an **Extended High Season**

Many partners have noted that the high season for travel is lasting longer than expected. Travelers are increasingly opting to visit destinations during what used to be considered shoulder seasons. They are also extending their trips into traditionally less busy months.

43%

of respondents noted **More Travel Throughout the Year**

Travel partners have reported a more steady influx of travelers throughout the year, with no distinct low season. Instead, there is a consistent demand for travel experiences year-round.

For a better understanding of how travelers are redefining their travel patterns, we dissect the dynamics of traditional travel times with information on High, Low & Shoulder Season: [What to Expect & When to Travel](#).

Emerging travel trends in 2024 bookings

Travelers in 2024 are looking for high-quality, customized, and unique travel experiences, and they are planning and booking well in advance to secure these experiences. There is also growing interest in authentic and less touristy destinations with a focus on slowing down the travel experience.

1

Increased Focus on Quality and Customization

- Travelers willing to spend more and request exclusive properties in unique locations.
- More interest in boutique hotels and upscale, unique experiences.
- A focus on custom activities and bespoke experiences.

2

Advanced Planning and Long Booking Windows

- While the average booking window has shrunk since 2019, luxury travelers looking for personalized experiences are planning their trips well in advance, with long lead times.
- Increased demand for multigenerational family and friends trips.
- A higher demand for villas and remote locations, indicating a longer-term planning approach.

3

Interest in Off-the-Beaten-Path and Authentic Experiences

- Per the feedback on high/low/shoulder seasons, travelers are seeking less crowded, authentic, and off-the-beaten-path destinations.
- More requests for destinations and tours that focus on cultural immersion, local restaurants, and interactions with locals.
- A trend towards slow travel, with travelers spending more time at each destination to savor authentic and signature experiences.

Europe Specific Insights



The #1 most requested destinations

Trends reveal that Mediterranean destinations, particularly those in Italy, hold a strong allure for travelers, while European capitals maintain their popularity. Europe caters to the diverse preferences of travelers seeking a wide range of experiences.

1

Popularity of Mediterranean Destinations

Many of the top requested destinations in Europe are located in Mediterranean countries. This indicates a continued trend of travelers seeking the charm, culture, and natural beauty along the Mediterranean Basin.

2

Preference for Italian Cities and Coastlines

Italy stands out as a popular country with multiple cities and coastal regions like Rome, Amalfi Coast, Venice, Florence, and Tuscany being frequently requested. Italy remains a top European destination for travelers.

3

Diverse Appeal of European Capitals

European capital cities, such as Madrid, Paris, London, Athens, and Edinburgh, continue to be highly requested.



The most unique activities for Europe

Travelers have diverse interests and seek authentic cultural experiences, exclusive access to local life, and outdoor adventures in Europe.

1

Experiential and Culinary Activities

Many of the unique activities revolve around experiential and culinary experiences. Travelers are seeking to immerse themselves in local culture through food and wine tours, cooking classes, private dining experiences, and artisanal workshops such as making medieval armor in Spain and crafting handmade chocolate in France.

2

Exclusive and Privileged Access

Travelers are showing a preference for activities that provide them with exclusive and privileged access to local life and culture. Behind-the-scenes experiences, private tours, and visits to the homes and workshops of local artisans go beyond the typical tourist attractions and gain a deeper understanding of local destinations.

3

Scenic and Outdoor Adventures

Travelers are interested in activities like sunset boat tours, hiking on glaciers, hot air balloon rides, and guided tours of natural wonders like the Cliffs of Moher and the Nærøyfjord.



New or unique places in Europe most travelers have not yet explored

There is a growing interest in exploring off-the-beaten-path destinations, where travelers can discover hidden gems, local culture, and untouched natural beauty away from crowds.



Emerging Regions in Italy

Regions such as Umbria, Molise, Basilicata, and Emilia Romagna are gaining attention as unique and less-explored destinations in Italy. These regions offer beautiful small medieval towns, pristine countryside, olive groves, vineyards, and a chance to experience the authentic Italian way of life. The Dolomites are also off the typical tourist track but offer impressive volcanic and dolomitic mountains and sweeping valleys.



Lesser-Known Islands and Coastal Regions

Travelers are beginning to explore less-frequented islands and coastal regions in Greece, including Naxos, Folegandros, Peloponnese, and the Northern Greek region.



Undiscovered European Regions

Some partners highlighted regions that are still relatively unknown to many travelers, such as the Pyrenees Mountains, Alta in Norway, Regensburg, Gobeklitepe Urfa, and Gaziantep in Turkey. These areas offer unique experiences, including outdoor adventures, hot springs, and rich culinary experiences.

Frequently requested destinations

While some destinations remain consistently popular, there is a rising demand for under-the-radar and diverse locations among travelers seeking different types of experiences in Europe.

1

Santorini Remains Popular

Santorini continues to be a highly requested destination. Travelers are still drawn to its iconic beauty and unique charm.

2

Emerging Interest in Under-the-Radar Islands

There is a growing trend where more travelers are asking for under-the-radar island destinations to experience authentic Greece.

3

Diverse Interests in Other Locations

There are references to a variety of places like Sicily, Tuscany, London, Edinburgh, and Ireland gaining interest, especially for those looking for more unique or authentic experiences.



Unusual seasonal patterns for travelers

Consistent with the global trend, there is a notable growth of travelers to Europe looking to escape the traditional high season and explore destinations during what were previously considered shoulder or low season months. This shift is driven by a desire to avoid crowded tourist areas, enjoy lower costs, and, in some cases, find ideal weather.

1

High Season Lasting Longer

Many travel partners have noticed that the high season in their regions is lasting longer than expected. The high season, which typically includes the summer months, is extending into September, October, and even November in some cases.

2

Increased Demand in Shoulder Season

There is a growing interest in traveling during the shoulder season. Travelers are seeking to avoid the crowds and high prices associated with the high season by opting for the shoulder season, which was traditionally less busy.



Additional Key Findings by Region





African Safari

As noted previously, trip requests for Africa are showing considerable momentum heading into 2024. In addition to increased bookings, 65% of our Africa travel specialists are reporting growth in family and group reservations, while nearly 80% report travelers are specifically seeking more upscale accommodations and unique experiences, including private and exclusive tours.

Unique Africa activities offered:

- Maasai Warrior School
- Snorkeling with Cape Fur Seals
- Hot Air Balloon Safari
- Food tours in local communities with local families
- Visit to the Hadzabe tribe - Hunters and Gatherers
- Fly Camping (sleeping under the stars)
- Luxury Star-bed sleepouts



Asia

Demand among different traveler types

- **Uptrend in Multi-Generational Families**

This indicates that more families with members spanning different generations are choosing to travel to Asia together

- **Rise in Japan Honeymoons**

Our partners noted a specific trend in the form of a rising demand for Japan honeymoons

Preference for upscale accommodations

The most prominent trend indicated by the responses for Asia is that travelers in 2024 are showing a greater preference for upscale accommodations and experiences compared to their pre-pandemic preferences.



Latin America

The most unique activities for Latin America

Latin America caters to travelers seeking adventure, nature and wildlife, and historical cultural exploration.

- **Adventure and Outdoor Activities:**
 - Rappelling down waterfalls
- **Nature and Wildlife Experiences:**
 - Whale watching
- **Cultural and Historical Exploration:**
 - Sunrise at Machu Picchu

New or unique destinations

- Corcovado National Park • Costa Rica
- Cuenca city • Ecuador
- Rio Celeste at Volcan Tenorio National Park • Costa Rica



South Pacific

The most unique activities for the South Pacific

Travelers are interested in a mix of adventure and outdoor activities, water-based experiences, and immersive cultural encounters when visiting the South Pacific.

- **Adventure and Outdoor Activities**

Responses such as "Adventure Tourism," which includes activities like bungee jumping, paragliding, sky-diving, jet boating, hot air ballooning, canyon swinging, and horse trekking, highlight the popularity of adventurous and outdoor experiences in the South Pacific

- **Water-Based Experiences**

Activities emphasize the attraction of water-based adventures, including snorkeling and exploring the Great Barrier Reef

- **Indigenous and Cultural Experiences**

Indigenous cultural experiences represent a trend of travelers seeking unique and immersive heritage experiences of the South Pacific

Conclusions

- Multi-generational family trips underscores the importance of catering to diverse age groups
- Customization in luxury travel remains a driving force
- Seasonality is being altered with many travelers choosing to take their trips at different times
- Off-the-beaten-path destinations are surging

Zicasso's 2024 Travel Trends Report concludes with a forward-looking perspective on the travel industry's evolution. Stability in destination preferences is anticipated, indicating a matured travel landscape where established favorites continue to shine. However, the growing prominence of multi-generational family trips underscores the importance of catering to diverse age groups within families and creating experiences that resonate with all types of travelers. Furthermore, the emphasis on quality and customization in luxury travel remains a driving force, with travelers increasingly seeking high-caliber, personalized experiences tailored to their unique preferences and interests.

The traditional high seasons have become busier and many travelers are choosing to take their trips at different times, extending the typical high season into the traditional shoulder seasons. Low seasons have also grown in demand with travelers to popular destinations. Coupled with the fact that travelers are looking for more off-the-beaten-path places even when revisiting familiar destinations, we see how travelers are finding different ways to make their preferred trips possible while also venturing into new experiential opportunities.

The travel industry continues to adapt and respond to the ever-changing priorities, needs, and goals of travelers. By understanding how our travelers intend to explore the world, their desires to visit familiar destinations in new ways, or the types of activities they hope to enjoy during their trips, Zicasso continues to position ourselves to meet their evolving demands, ensuring that we deliver top-tier and bespoke luxury experiences in 2024 and beyond.

