

GLOBETRENDER

THE FUTURE OF TRAVEL

TRAVEL IN THE AGE OF COVID-19

IN ASSOCIATION WITH



TRAVEL IN THE AGE OF COVID-19

Welcome to Globetrender's report on *Travel in the Age of Covid-19* (published June 2020), in association with Cirium and The PC Agency.

After months of lockdown, during which half the world's population has been ordered to stay at home, some governments are opening borders and allowing airlines to start flying again, which is great news for holidaymakers and travel companies alike. But moving from a "collective pause" to getting back to business will be challenging.

In Europe, a handful of countries, including Greece, France, Italy and Spain, say they will be open to foreign tourists this summer (albeit with perspex screens to keep

sunbathers and diners from getting too close), but many others such as Africa, Argentina, Brazil, Indonesia and India will need more time.

Although many of us will be hoping for a return to "normality", when it comes to travel, this simply won't be the case. Arrivals may be required to self-isolate for 14 days (although UK travel bosses are campaigning against this), while the US may be opening up internally but not to outsiders just yet. Flying will be strangely dystopian, while city breaks, pool parties and buzzing resorts will rank low in the desirability stakes.

Since the beginning, Globetrender's defining remit has been the future of travel. Now, the entire industry is looking

for answers as to what lies ahead. As trend forecasters, we aim to provide a reliable degree of illumination. In this report, we have identified ten trends that we think are most relevant for the short-to mid-term (summer 2020 to early 2021), as well as stories of innovation, new ideas, expert predictions and sector deep dives (in this case, luxury travel, Gen Z and travel publishing).

A lot of commentators are talking about the "new normal", but for Globetrender, there is nothing normal about the turbulence we face in the year ahead. We will do our best, of course, to adapt to the ever-changing rules for social behaviour, trade, transport, work and so on, but we will all have to accept it will be a while until masks stop being an essential item of clothing.

GLOBETRENDER.COM/DOWNLOADS



Download Globetrender's *Gen Z Horizons: Travel in 2020 and Beyond* (£85 + VAT)



Download Globetrender's *Future of Luxury Travel Forecast: 2020-2025* (£195 + VAT)

There will be recessions to contend with, unemployment and the complete rewiring of expectations for urban living. There will also be greater citizen surveillance and more automation, as AI-powered machines get the moment they have been waiting for.

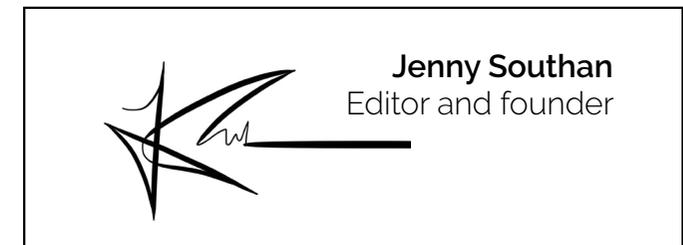
This may sound alarming but ultimately, Globetrender believes that amid the white noise, there will be clarity, opportunity and betterment to be

gained, and space for creative thinkers to innovate their way out of problems.

Reassurance can also be found in the fact that people will have an even stronger desire to spend time with friends

and family (celebratory reunions are something to look forward to), as well as explore the world.

Globetrender would like to thank Cirium and The PC Agency for supporting this project. We hope you find it useful.



NEW: GLOBETRENDER FUTURE OF TRAVEL CONSULTING PACKAGE

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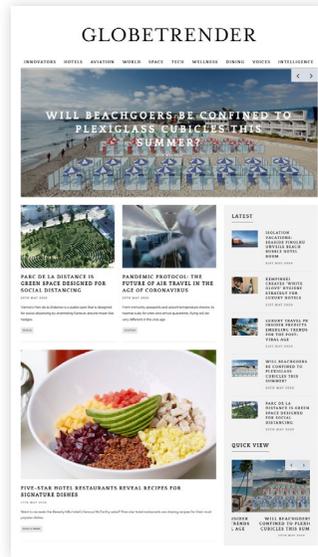
GLOBETRENDER



ABOUT GLOBETRENDER

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Globetrender (globetrender.com) is a digital magazine and trend forecasting agency dedicated to the future of travel. Founded by Jenny Southan in 2015, it delivers cutting-edge insights into the ways people travel in the 21st century. Run by a team of highly experienced journalists and editors, its editorial and consulting services are there to arm you with the knowledge you need to future-proof your company.



IN ASSOCIATION WITH WATERFRONT PUBLISHING

Waterfront Publishing (waterfront-publishing.com) is an independent magazine publisher based in East London. It creates print, mobile and online media, and provides editorial, design, proofreading and marketing services. It is the publisher of *ABTA Magazine* and *Cruise Adviser*, both aimed at the travel trade.



JENNY SOUTHAN, EDITOR AND FOUNDER

Jenny has 13 years worth of experience working as an award-winning travel journalist, with ten years as features editor of *Business Traveller* magazine. As well as running Globetrender, she freelances for titles such as *Condé Nast Traveller*, *The Telegraph* and *Mr Porter*. When the coronavirus pandemic took hold, she knew Globetrender would have to tackle its impact on travel head-on, and immediately set to work analysing emerging trends. She is excited to share this first report with you, which will be part of an ongoing series.



ROSE DYKINS, CONTRIBUTOR

Rose Dykins is a freelance travel writer and editor with a background in business travel and a penchant for intriguing experiences, such as bison-spotting in Poland. She can't wait to explore Japan's "museum archipelago" in the Seto Inland Sea when she eventually goes on her "second-attempt" honeymoon after the first was postponed due to Covid-19. During lockdown, Rose and the co-hosts of her podcast, *The Carry On*, have been recording episodes remotely and dreaming about future trips.



MARISA CANNON, CONTRIBUTOR

Marisa Cannon is a travel editor who has worked with brands including British Airways and Jaguar Land Rover, and has written for *Business Traveller*, CNN.com and the *South China Morning Post*. Having lived on four continents before the age of 18, she's keenly aware of the speed at which travel evolves, and is inspired by the ingenuity coming from the travel sector in the face of Covid-19, from airlines providing meals to quarantined medical staff, to hotels that have turned rooms into pop-up restaurants. The volcanic caves of Lanzarote are next on her bucket list.



ANALYSIS AND TREND FORECASTING

At Globetrender, we focus on qualitative research underpinned by quantitative data. We always consider how the lifecycle of a trend moves from the innovators that trigger them on the minority fringes, on to the early adopters, early majority, late majority and, finally, the laggards.

When searching for trends, we apply the “three times” rule. A one-time occurrence is an anomaly, twice is a coincidence and three times is a trend, worthy of further exploration. The identification and naming of trends is based on IOI: Intuition, Observation and Investigation. This is both a creative and academic process. For

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

These are based on STEEP – Social, Technological, Economic, Environmental and Political – forces. Innovation is at the

root of every trend so we are always looking at what is new and disruptive. Just like news reporters, we ask the questions “who”, “what”, “where”, “why” and “when”? But like investigative journalists, we then dive much deeper.

By discovering multiple examples of a trend, conducting desk- and field-based research, interviewing insiders and producing case studies, “qualitative” proof of it is generated. At Globetrender, we rely on our unique access to travel industry experts and ongoing consumer observation to remain ahead of the curve. Email jenny@globetrender.com for further insights and bespoke consulting into travel of tomorrow.

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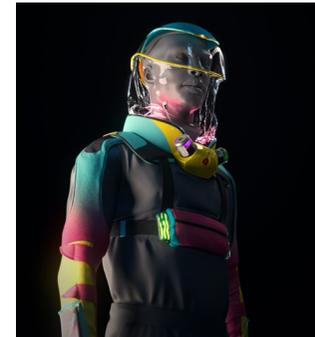
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TRAVEL PUBLISHING





Jeremy Bowen, CEO of Cirium, explains how to use data to forecast travel trends when confronted with an avalanche of information.

How reliable is historical data for predicting the future?

Cirium is the go-to source for travel data, including airline schedules. We have the most comprehensive data set of historical schedules in the world, which go back 16 years – as well as 11 months into the future.

As much as companies might wish we had a crystal ball to see how the travel industry will look in 2030 or 2050, forecasting is never an exact science. However, analysing patterns in historical data enables analysts to detect trends and forecast outcomes that could occur at specific times and within certain parameters.

The reliability of these future predictions depends on the quality of that data and the experts who analyse it. Great data scientists can test various hypotheses using techniques such as statistical modelling and machine learning to generate possible future scenarios quite reliably.

Past data helps establish a baseline for potential outcomes in a given scenario and determine how likely each of those outcomes is to occur. A business can then make informed

decisions about its operations in times of uncertainty.

Are travel searches a good indicator of whether someone will actually book a trip?

Under normal conditions, travel searches are a very useful indicator for consumer demand and future bookings. Airlines, hotels and destination marketers closely watch trends in online search to forecast demand and set pricing. Yet current conditions are anything but normal.

According to Skyscanner, travel searches were up in April, week-on-week, by double digits in all major markets and mostly centred around national holidays. Skyscanner survey data shows that travellers are increasingly optimistic about the safety of travelling six months from now and feel better about

domestic travel over international travel.

However, uncertainty about travel safety amid Covid-19 indicates that current searches may be simply aspirational. That is, they may or may not lead to a spike in bookings when lockdown measures are lifted.

There is still a great deal of risk that Covid-19 could rage again due to premature reopenings and lax behaviour. A strong second wave of infections is the last thing the travel industry needs.

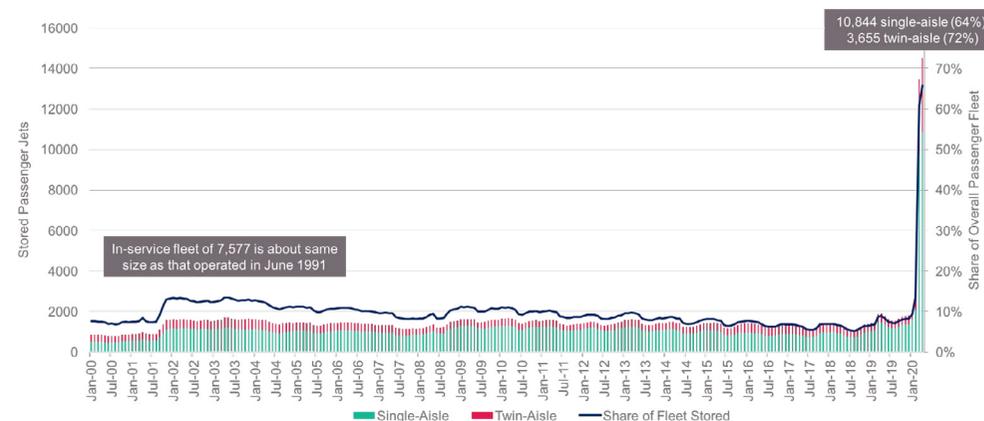
What is unique about the coronavirus pandemic in terms of the data associated with it?

As the virus has grown exponentially and, in some cases, unpredictably around the world, the data associated with it has changed rapidly from day to day. We have had to adapt our operations to respond to the ever-changing landscape. For example, fusing multiple data sets, including flight status and schedules, to gain a complete picture

of flight disruption, as airlines began to adjust their schedules on a minute-by-minute basis.

The key value in the data surrounding coronavirus is the insight it provides businesses to plan and prepare for recovery, such as aircraft rotation and how and when to bring aircraft back into service efficiently. Everyone is looking to the Asia-Pacific region as we begin to see domestic flights return to the skies.

Parked fleet around 14,500 aircraft, 66% of global fleet (but stabilising)



Source: Cirium Fleets Analyzer, passenger jets in service / stored, April 2020 as at 20th April

The second element of recovery that the industry needs to address is how to tackle the inevitable downturn in consumer confidence once lockdown restrictions are lifted globally. This means demand forecasting is likely to become the next challenge for data modelling.

What kind of data are you gathering and analysing in relation to the travel industry, and from which sources?

Cirium has an unrivalled data platform – the Cirium Core – which houses data from more than 2,000 sources from all corners of the aviation and air travel industry. We have direct data feeds of schedules from more than 900 global airlines and work with over 90 per cent of the world's top 50 carriers.

When air travel isn't restricted, and is operating like it was

earlier this year, we have the capabilities to track up to 120,000 flights in granular detail per day. We track global commercial flight activity in real time by processing more than 100 million flight updates in total per day and maintain an archive of flight activity worldwide.

Drawing from commercial flight schedules, real-time flight activity and the global aircraft fleet, most of our data comes from trusted relationships with airlines, airports, global distribution service providers and international government bodies.

How do you turn big data into smart data?

Sourcing data is just the beginning of the process. To ensure the accuracy, predictability, and fullness of our data, we invest heavily in data cleansing,

verification and scientific extrapolation processes. This is what transforms big data into smart data.

When new data enters our system, we compare overlapping sources to select the most accurate and reliable source. Then, we format the data according to globally respected best practices and standards, using techniques such as machine learning to generate the most complete picture.

If you combine this with the talent at Cirium, you create advanced views of data which become actionable insights for the user. It's people who make big data truly smart and that's why we employ some of the best people from all backgrounds, from astronomers to tech giant alumni and airline network planners to aviation finance consultants.

What trends are you seeing for the future of aviation in the age of coronavirus?

Based on IATA's prediction of a 48 per cent drop in air traffic this year, we are projecting that we will initially see at least seven years of passenger traffic growth wiped out in 2020. We'll see a drop in demand for leisure and corporate travel, as disposable income falls and former business travellers, or "road warriors", learn to

work from home.

We could start to see a very different airline sector. Our teams have been tracking the commercial passenger jets in service and in storage in recent months and their analysis shows that of some 23,000 aircraft in service at the start of 2020, as many as a third could be immediately surplus to requirements.

Artificial intelligence (AI) will play a more pivotal role than ever, as

airlines and the air travel market seek to embrace digital transformation to become more efficient.

We may also see changes in traveller behaviour as social distancing becomes the new normal for the industry. Greater hesitancy to engage with services requiring human contact could see a rise in self-serve tools, robotics and automated processes to avoid unnecessary contact when travelling.



DOMESTIC SANCTITY

For many people, the best way to guarantee a safe, hassle-free break will be to stay in their country of residence – renting holiday homes and setting off on road trips

By Rose Dykins

Passport-free holidays will be the norm for 2020. This is for a number of reasons: border closures and arrival quarantines, the fear of getting ill abroad, concern about having to negotiate airports and planes, and limited disposable income.

Some commentators are using the word "staycation" to describe domestic tourism, but what Globetrender is referring to is hitting the road and going somewhere different – without having to leave the country.

France and Greece are allowing domestic holidays from June. In England, hotels, campsites and tourist attractions might be allowed to open their doors from July too, although many may choose not to until later in the year, depending on what social distancing measures need to be implemented.

Domestic tourism (both overnight and day trips) in England contributed £80 billion in 2019 but coronavirus is expected to knock £22 billion off that figure in 2020, according to Patricia Yates, acting chief executive at Visit Britain.

She said: "To get British tourism up and running this summer, you're going to need that domestic audience. [But] I think the worrying thing is the lack of confidence in the British public about travelling."

Among some segments of society, however, there is huge pent-up demand for travel. During lockdown, operator Luxury Cotswold Rentals told Globetrender it has seen a 166 per cent year-on-year increase in traffic to its website, and a 138 per cent rise in the number of enquiries.

In China, during its May bank holiday weekend, more than 50 million domestic trips were made in two days after

the government eased lockdown restrictions. Prior to this, there were staggeringly cheap deals on flights within the country – nicknamed "bok choy" tickets by the media, because they were the same price as vegetables.

Countries with large domestic flight networks may initially experience similar deals from airlines to encourage travellers to return to the skies.

However, where possible, Globetrender predicts travellers will choose to go by road in the virus-free safety of their own car. Tapping into this, US-based startup RoadTravel is now offering "road trip packages" – curated itineraries, trip planning features and accommodation booking powered by sites such as booking.com.

Founder Nikita Dedik says: "The crisis not only hasn't hurt us but so far it's helped us."

Camper van sales are also booming. "We have seen a dramatic rise in inquiries," Steve Lumley, of CamperVantastic, told *The Times* in May.

Some tourist boards are thinking up ways to encourage domestic travellers to book trips to boost the economy. In Poland, the government has been mulling giving each citizen vouchers worth 1,000 zloty (about US\$238) to be spent on domestic holidays.

Thailand has launched a "We Love Thailand" campaign, promoting national attractions, while New Zealand is pinning its hopes on recouping lost dollars from inbound tourists by getting locals to explore what's on their doorstep. However, care will have to be made to ensure hotspots are not overrun, which is what happened when the US reopened Yellowstone National Park.





GERMAPHOBIA

Extreme hygiene measures for hotels and airlines will be vital to restoring public confidence, but older, more vulnerable generations will be wary

By Marisa Cannon

In 2019, supermodel Naomi Campbell published a video detailing the cleaning routine she undertakes every time she boards a plane, where she systematically disinfects everything from the armrests and in-flight entertainment control to the window. "I do not care what people think of me," she declared, wiping down the shell of her seat with a Dettol wipe.

In the age of Covid-19, Campbell's eccentric behaviour will be vindicated, and we'll all be following suit once the airways are open.

Following the example of Qantas, British Airways, Etihad and Delta, most airlines will be taking extreme measures to increase hygiene on board by using electrostatic spraying to kill germs and viruses in the cabin, for example, as well as handing out sanitising kits,

boarding via the back of the plane (from row one onwards), and removing in-flight magazines.

Emirates has banned all cabin baggage beyond briefcases, handbags laptops and baby items, and is mandating the use of gloves and masks, while also giving passengers blood tests at the airport to check for antibodies.

Etihad is trialling Elenium contactless kiosks that measure passengers' temperature, heart rate and respiratory rate, and Hong Kong and Tokyo airports are giving rapid Covid-19 tests to passengers arriving home from high-risk areas.

IATA has issued guidelines that state cabin crew should be dressed in full personal protective equipment (PPE), including plastic gowns over their uniforms, goggles, masks and gloves. The Civil Aviation Administration of China has even gone

so far as to recommend that crew wear disposable nappies to avoid potential infection through use of the lavatory.

In the longer term, expect cabins to incorporate new physical distancing designs, such as the new Janus seat from Aviointeriors, which features a double-S-shaped wraparound plastic barrier between passengers.

Hotels, meanwhile, will be looking to redefine the way they interact with guests in order to minimise touch points. The Four Seasons Hotel in New York City has started performing virtual check-in and check-outs, and has removed minibars, excess hangers and linens. It has also suspended restaurant, bar and room service for the foreseeable future.

Since March 2020, L'hotel Island South in Hong Kong has deployed AI robots to serve food



and drink to guests in quarantine, while Millennium Hotels and Resorts in Singapore is currently benefiting from early investment in delivery robots, which can call for an elevator, find the right room and contact guests on the phone.

Deep cleaning between stays will become the norm, with Accor, Radisson, Kempinski, Hilton and Marriott all launching initiatives to promote cleaning practices such as the use of hospital-grade

disinfectant and ultraviolet light technology to sanitise keys and mobile devices. (Globetrender also hopes pillows will be washed between stays.)

Increased hygiene concerns may well cause travellers to think twice about sharing economy platforms such as Airbnb and Uber, whose models are predicated on rentals that enjoy a vast number of prior users. Despite Airbnb's new hygiene guidelines for hosts and guests, holiday homes and the furnishings inside them

may now be considered potential vectors.

So too could beach deckchairs and umbrellas, and we might see the introduction of reservation systems and time slots for different age groups visiting the seaside. Italian plastics manufacturer Nuova Neon Group 2 has developed designs for 20 sqm plexiglass cubicles to separate beachgoers. "We've already received several inquiries from beach operators and restaurants," says owner Claudio Ferrari.



WILDERNESS SEEKING

As consumers flock to natural environments with plenty of fresh air, escaping to the great outdoors will replace city breaks and crowded resorts as the holiday of choice

By Rose Dykins

WILDERNESS SEEKING



In the social distancing era, nature tourism will rocket in popularity.

Travellers will crave wide open spaces and inspiring views after being homebound, and escaping to the wilderness will feel safer than visiting crowded cities or clubbing destinations. The restorative benefits of being in nature also make it the ideal choice of trip to recuperate, dose up on vitamin D and process the chaos of Covid-19.

Ready to capitalise on this trend, Yonder offers travellers the chance to book stays in cabins and at farms and ranches across the US, as well as try outdoor experiences such as horse bonding and mushroom hunting. "In the past, much of our vacation time has been spent in contrived environments shut off from the natural world – a cruise ship, a theme park, a casino or an

all-inclusive resort," says Freyr Thor, Yonder's CEO and co-founder. "As we recover from Covid-19, people will be looking for alternatives that offer them a more natural, sustainable and healthier way of travelling and living."

Camping and glamping will also attract new devotees. According to peer-to-peer RV rental marketplace RVshare, it has achieved its highest recorded booking numbers in company history, with a 650 per cent rise in RV rental bookings since early April.

However, sites will need to maintain high standards of cleanliness when it comes to shared facilities, as well as limit the number of guests booking and introduce greater distances between tents or yurts.

During lockdown, national parks throughout the UK and US, for example, were closed, but

by mid-May, these were starting to open again. Next spring, AutoCamp will be opening a luxury glampsite in Cape Cod featuring custom-designed Airstream trailers.

Over in Bhutan, the only carbon-negative country in the world, Six Senses has created a new hotel lodge set among blue pine trees. Treehouses will also be big business – up in Perthshire, Scotland, the Treehouses at Lanrick will debut in September with self-catering facilities.

At a time of continuous, anxiety-inducing media coverage of the pandemic, nature provides true sanctuary. Committed to the preservation of "quiet", Quiet Parks International is a nonprofit organisation that seeks to protect "acoustically pristine environments" across the globe. As urban noise increases, silence will be the new wellness.

Rewilding and conservation holidays – where travellers play an active part in helping an ecosystem return to its natural state – will also be a hit. Plus, the funds will be much needed after a considerable hiatus.

For example, Argentina's Iberá Estuaries – the world's largest freshwater wetlands – has four campsites for visitors, the income from which helps finance the reintroduction of native species, including jaguar cubs. (The country has suspended commercial flights in and out of the country until at least September, however.)

Inventive cities are also trying to introduce more green space – Copenhagen, for instance, is building an archipelago of artificial islands, only accessible to swimmers and sailers, which can be used for picnics and fishing.

AIRLINE HUNGER GAMES

With airline revenues expected to plunge as much as £314 billion in 2020, carriers around the world will be doing everything they can to win back passengers

By Jenny Southan

AIRLINE HUNGER GAMES

It's a bloodbath out there. Airlines are fighting for survival in a way they've never had to before, with fleets almost entirely grounded around the world. British Airways is in redundancy consultations with 12,000 staff and exiting Gatwick; Virgin Atlantic is cutting a third of its workforce, while owner Richard Branson is selling a US\$500 million stake in Virgin Galactic to bail it out.

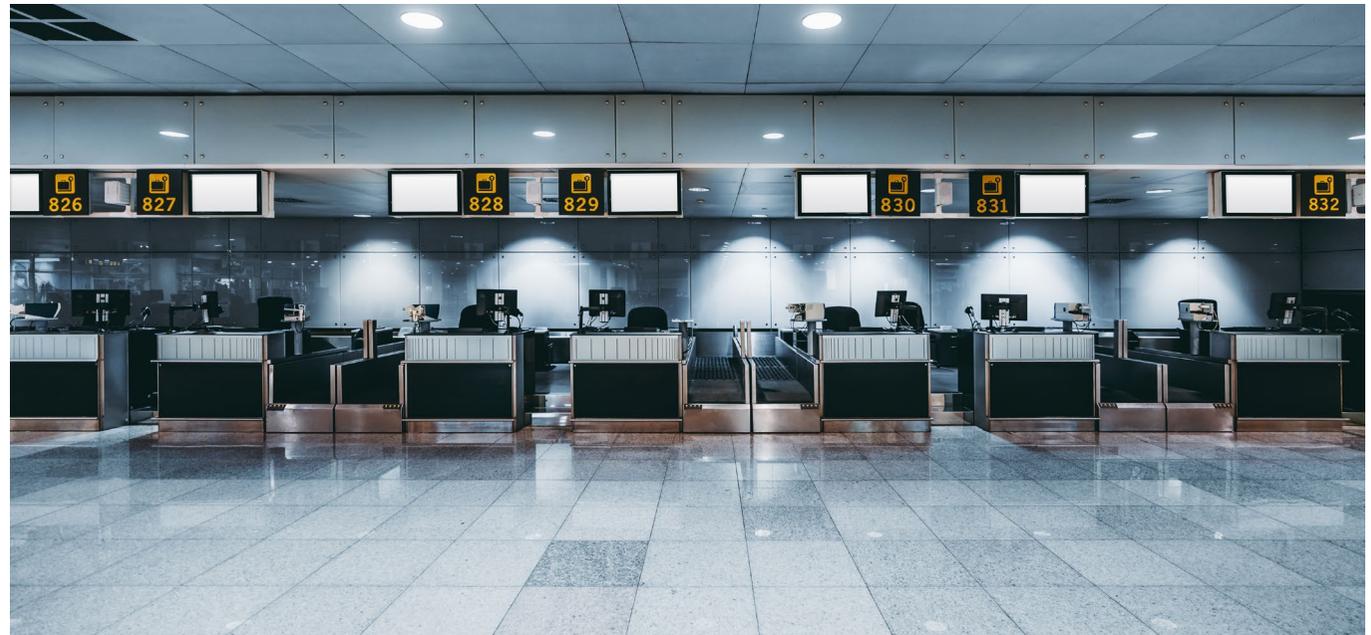
Easyjet experienced a major hack of nine million passengers' data in May, while its founder Stelios Haji-Ioannou has been quarrelling with its "scoundrel" board about cancelling an order for 107 planes from Airbus. Ryanair boss Michael O'Leary has been outspoken in saying plans for quarantining flyers and social distancing on planes are "idiotic", and ultimately expects

passenger numbers to be 50 per cent lower by the end of 2020.

Airline Hunger Games is a trend because it refers to the way in which carriers are going to be trying to manoeuvre their way out of the crisis over the coming months. This summer, travel bans will start to be lifted country by country, but reviving route networks and reassuring passengers that it is safe to fly will be a major challenge. Boeing

CEO David Calhoun has said that air traffic won't even be back to 25 per cent by September and a major US airline will "most likely" go out of business.

The world's second-oldest airline, Avianca, which was based out of Bogota, was driven to bankruptcy in May, and others will follow unless they can secure financial help. Just like in the book-turned-film *The Hunger Games*, those with friends



in high places can help players endure, but they will need clever tactics to outlive the competition.

During lockdown, airlines were offering early seasonal flight sales with discounted tickets to help them get money in the bank on forward bookings, but as flights start taking off again, we can expect a shift towards price hikes to make routes viable.

It has been suggested that airlines could stop selling middle seats to create "social distancing" in the air. However, this will mean they will only be able to sell about two thirds of tickets, and with margins tight, this will force them to at least double fares.

Qantas is an example of an airline that says it won't be blocking out seats. "Social distancing on an

aircraft isn't practical the way it is on the ground," Qantas medical director Dr Ian Hosegood said. He added: "Given the low transmission risk onboard, we don't believe it's necessary." The likelihood is airlines will sell every seat they can, and passengers will have to make do with sitting apart if space allows.

Pent-up demand will no doubt be something

all airlines want to capitalise on, allowing them to inflate prices and start recouping some of their losses. Seat sales to stimulate bookings will always be a useful tactic though. Sadly, the days of smiling crew and G&Ts will be behind us for the time being. Flying will be sanitised, tense and utilitarian, so travel companies need to make it worth the effort.

The impact of Covid-19 on the aviation industry, in numbers

Air travel almost came to a halt in spring 2020 - what does recovery look like?

£7.9 trillion

contribution to global GDP from travel and tourism industry

Before COVID-19 outbreak



Compound Annual Growth Rate of passenger traffic over the past 10 years

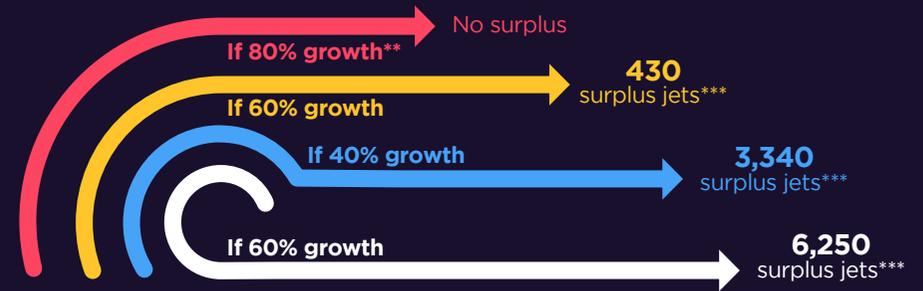
After COVID-19 outbreak



Drop in total passenger traffic as of March 2020 compared to a year ago

WHAT WILL HAPPEN TO THE FLEET IF TRAFFIC RETURNS IN 2021?*

(POTENTIAL TRAFFIC GROWTH & ITS IMPACT ON AIRCRAFT FLEETS)



*Assuming load factor recovers to 70%
 **80% growth from where we currently are
 ***Figures include new deliveries

CAPACITY CHANGES YEAR-ON-YEAR BY REGION

80%

reduction in capacity by the end of April on a daily basis compared to 2019

US domestic



76% reduction

Intra-European



89% reduction

China domestic



Note: All references to 'now' are equal to accurate stats on the 29th May 2020
 Source: Cirium Core, IATA

GLOBAL FLEET STORY

	START OF 2020	NOW
Fleet highlights	In-service fleet 2020 23,710	In-service by end of May 9,056
Parked fleet	6% global fleet	59% global fleet
Single-aisle aircraft being tracked in real-time	14,000	4,560
Twin-aisle aircraft being tracked in real-time	4,000	835

An aerial photograph of a tropical beach. The water is a vibrant turquoise color, transitioning to a lighter, shimmering white as it meets the shore. The sand is a pale, golden-brown. In the lower right, there is a unique accommodation structure consisting of several interconnected dark, cylindrical pods with large, clear, spherical domes. One of the domes is open, revealing blue seating inside. A small boat is moored near the structure. The background shows a dense line of green tropical trees and vegetation. The overall scene is serene and luxurious.

ISOLATION VACATIONS

From private jet transfers and charter yachts, to bubble hotels and desert islands, human-free locations and experiences will be the new luxury to charge for
By **Jenny Southan**

ISOLATION VACATIONS

Many travellers will be dreaming of hedonistic getaways in the sun, with parties, drinking and dining. However, travel in the age of coronavirus will mean the majority will be seeking Isolation Vacations, either as a couple or with close friends and family in places devoid of crowds.

This means popular beaches, home-share rentals, large resorts, and busy cities will all be low on the desirability scale, while private villas, boats and boutique hotels (all with excellent cleaning standards), and quiet coastal, lakeside, mountain and rural locations will be scoring high. Not to mention helicopter transfers, hotel takeovers and island buy-outs, for those that can afford them. (VistaJet, for example, is offering private jet-to-yacht transfers for moorings off

the coast of Malta.)

Setting the trend for "quarantine hideouts" is Le Bijou hotel in Zurich, which started offering luxury apartments with "Covid-19 Service" as part of the package; this included food delivery, meals cooked by a

personal chef (ordered remotely via iPad), 24/7 health monitoring and even in-room coronavirus testing.

In the US, wealthy groups are looking to rent out entire hotels, such as Relais & Châteaux's Blantyre country resort in

Western Massachusetts, which costs US\$38,000 a day (including meals and activities) and has 24 rooms. Similarly, the Cape Arundel Inn in Maine charges US\$19,000 a week for 14 bedrooms with sea views.

In Europe, The Greek

Villas company is providing the elite with private jets (via partner Bookajet) to take them to their destination, as well as hotel-style service and bespoke travel insurance from Lloyd's of London.

Hotel brands such as Four Seasons and Aman, which offer private residences with butlers on-site, can also expect to do well, as can companies that offer private yacht charters. New for 2020 is a company called Meridian Adventure Sail, which is a private members' club for "meaningful, exclusive voyages".

In the Maldives, the ultimate in seclusion has to be taking over an entire island – Sun Siyam Resorts recently announced that for US\$1 million for 15 days and up to 50 guests, visitors can book one of two islands (Iru Veli or Vilu Reef).

Meanwhile, the Seaside Finolhu has unveiled the Maldives' first Beach Bubble room – a transparent dome on the shore with a double bed and bathroom (a step up from Italy's proposed plexiglass beach cubicles).

For those on less lavish budgets, many hotels will be trying to create less crowded settings by only selling half their room inventory, while self-catering cottages, treehouses, tents and caravans will all be available at more affordable price points (also ideal for those rushing to book a domestic holiday).

Innovation will be rewarded at the lower end of the scale too – consider Norway's Birdbox cabins that host just two people and can be placed in pristine natural environments with minimal footprint.



ANTI-VIRAL ARRIVALS

Whether it is through quarantines, air bridges, airport testing or thermal scanning, the pressure will be on authorities to make sure outsiders don't bring in new cases of Covid-19

By Marisa Cannon





Airlines and governments around the world are clamouring for solutions to make travel safe again, and while immunity passports might sound like the plot twist of a dystopian novel, there's been talk around whether they might serve as a way of reigniting tourism. Chile was the first country to push ahead with "release

certificates", while Turkey and Thailand have said they will ask visitors to show medical certificates declaring they have tested negative for coronavirus. In parts of China, WeChat and Alipay have issued citizens with a coloured health code that dictates where they can travel.

However, the World Health Organization has said that governments

should not issue immunity passports, as there is "no evidence" that people who have recovered from coronavirus are protected against a second infection. The US, Spain and Hong Kong are among some of the countries that have instated temporary 14-day quarantines for arrivals, while airports worldwide including Heathrow are testing thermal screening,

Greece's public health body plans to create "quarantine hotels" for visitors who test positive while in the country, and will issue health certificates to passengers within 72 hours of their arrival.

These measures are unlikely to entice travellers, with an IATA survey finding that 86 per cent were "somewhat or very concerned about being quarantined while travelling", while 69 per cent "would not consider travelling if it involved a 14-day quarantine period".

Another deterrent might be heightened racial intolerance, with reports of coronavirus-related attacks and Africans in China being turned away from hotels and restaurants, blamed for carrying the so-called "second wave" of coronavirus.

This year, 1.1 billion fewer trips are expected to be made globally (the global travel and tourism industry

was predicted to rake in US\$700 billion but is now only on track for US\$447 billion). Tourism revenue in Europe will likely drop from US\$200 billion in 2019 to US\$124 billion in 2020.

The European Commission has issued guidelines on how countries might reopen its borders, suggesting "a phased and co-ordinated approach that starts by lifting restrictions between areas or member states with sufficiently similar epidemiological situations". These so-called "air bridges" could be an alternative to quarantining.

Members of the EU are also allowing Covid-19 tracing apps to operate across borders so citizens can be alert to possible infection while travelling. In a statement, the Commission said: "Such tracing apps must be voluntary, transparent, temporary, cybersecure, using anonymised data,

should rely on Bluetooth technology and be interoperable across borders as well as across operating systems."

Nations that responded quickly to the outbreak will be the first to open their borders, with some neighbouring states making plans to allow people to move freely. From mid-May, citizens in Latvia, Lithuania and Estonia could travel between the Baltic states, although anyone from beyond is required to quarantine for two weeks.

Australia and New Zealand have agreed to a trans-Tasman travel zone. In the Mediterranean, Israel, Greece and Cyprus are in talks over a "tourism-safe zone", with the aim to partially open borders. It's clear that any reopening will be gradual, and governments are prepared to shut down travel permissions as soon as the virus resurfaces.

DESTINATION OPENINGS

With lockdowns easing and travel bans lifting, these will be some of the first countries to start welcoming visitors from abroad in mid-2020
By Marisa Cannon



AUSTRALIA AND NEW ZEALAND

Prime ministers Scott Morrison and Jacinda Ardern have made plans to introduce a "trans-Tasman travel bubble" for travellers between Australia and New Zealand, although a 14-day quarantine will likely be required. New Zealand-Pacific corridors are also a possibility.



AUSTRIA

Austria is opening to health certificate carriers from Liechtenstein, Switzerland, Germany, the Czech Republic, Slovakia and Hungary on June 15.



CANARY ISLANDS

The Canary Islands are part of a UN World Tourism Organization pilot scheme to start welcoming visitors

from July. The idea is to test out social distancing measures, a new Hi+ Card health passport and a track-and-trace app.



CHINA

China has announced a bilateral agreement to allow healthy travellers free movement with South Korea, while negotiations with Singapore and Japan for a similar arrangement are in the works.



FRANCE

Tourism to France will initially start from Switzerland and Germany by June 15. Health certificates will be required for entry, with the option of 14 days of quarantine on arrival if this is not possible.



GERMANY

In mid-May, Germany agreed to reopen borders to France, Austria and

Switzerland with the aim of allowing free travel with other European nations from mid-June, if the Covid-19 situation allows.



GREECE

Greece has had low infection rates and hopes to open borders by July 1. There will be random coronavirus testing for arrivals and hotels likely to be restricted to 50 per cent occupancy.



ICELAND

Foreign travellers will be able to enter Iceland from June 15 providing they test negative for the virus on arrival or present a recent health certificate.



ITALY

Italy is opening borders in early June although social distancing requires beach umbrellas to be five metres apart.



LITHUANIA/LATVIA/ ESTONIA

With fewer than 150 deaths between them, these three Baltic states were the first in Europe to establish their own "travel bubble". Neighbouring Finland and Poland have been approached to join



PORTUGAL

Less affected by the pandemic than Italy and Spain, Portugal will be opening up to tourism from June 15, with Easyjet flights from the UK to Lisbon and Porto.



SAINT LUCIA

The Caribbean island will be reopening to tourism in a "responsible manner" from June 4,

starting with flights from the US. Visitors will need to take a Covid-19 test within 48 hours of arriving.



SPAIN

This year, Spain won't achieve the 84 million international visitors it did in 2019 but it will be welcoming back tourists from July 2020.



TURKEY

The Turkish government is hoping to start the holiday season for foreign travellers from mid-June, although hotels opened to domestic tourists at the end of May.



VIETNAM

With just 270 cases and no deaths from coronavirus, Vietnam has restarted domestic flights and is in talks with China and South Korea over reciprocal safe travel zones.

SUSTAINABILITY PARADOXES

Although the pandemic has given the Earth a chance to heal, the travel industry is at a cross-roads when it comes to prioritising money-making over environmental conservation
By Marisa Cannon





The headline of a recent news story in *The Independent* read: "Coronavirus could trigger biggest fall in global carbon dioxide since Second World War, scientists say." One of the few benefits of the pandemic has been the environmental bounceback we have witnessed, with daily emissions in the EU

down 58 per cent since the outbreak and global levels of nitrogen dioxide at record lows. About eight in ten flights globally have been grounded and previously tourist-clogged beaches and jam-packed streets have been left eerily empty, giving wildlife greater freedom to roam where it pleases.

The silver lining is, of course, temporary, and

as soon as the global economy jerks back to life, the respite that the planet has enjoyed will be undone. As governments tussle to revive ailing industries, environmental initiatives may well take a back seat.

At the Airlines4Europe summit in March, CEO of Air France-KLM Benjamin Smith asked governments to delay upcoming policies

that would limit air travel and reduce emissions, while spokesperson for Airlines4Europe Jennifer Janzen said: "We definitely don't need new taxes right now. It doesn't make any sense whatsoever to burden airlines and passengers with higher prices."

But experts and campaigners have called for "stringent conditions" aligned with the Paris Agreement on any airline bailout, as well as support to help workers affected re-skill. In a letter to UK chancellor Rishi Sunak, a group of 26 civil society groups wrote: "Public money must be used to address social and environmental priorities, as well as economic needs."

Meanwhile, Transport and Environment aviation manager Andrew Murphy has called for "a green transition by linking aid to taxes and greener fuels which will

reverse the sector's rapid emissions growth."

The reality is that colossal revenue losses may well leave airlines with little option but to discard offset plans. "Any sound business will prioritise their existing liabilities and payroll over voluntary investments in future sustainable aviation fuel volume," says Adam Klauber, a technical advisor at the Rocky Mountain Institute.

One boon for airlines is the plummeting oil price, but this could also deter them from investing in more sustainable, long-term solutions, such as expensive biofuels (Lufthansa wants to make fuel from sunlight and air) or cleaner, fuel-efficient aircraft.

The question now up for debate is whether travel brands will scramble to return to normalcy once the pandemic lifts, or be galvanised by this

"breather" to maintain and go further in their environmental and social commitments. The unpolluted blue skies and birdsong are likely to have struck a chord with many, and it could be a promising moment for companies advocating a more considered approach to travel.

Proponents of slow travel may well see greater interest in their philosophy, where travellers take longer trips to more unusual destinations, reached by alternative transport such as trains. Globetrender hopes that travellers and industry leaders will take responsibility for carbon offsetting as a bare minimum, as well as doubling down on reducing plastic waste, which sadly has rocketed because of demand for bottles of hand sanitiser, surgical masks and takeaway food containers.

UNPRECEDENTED FLEXIBILITY

For jet setters tempted to swap the security of home for a trip abroad, travel companies will be encouraging bookings with free cancellations, no change fees and status extensions

By Marisa Cannon



UNPRECEDENTED FLEXIBILITY

The fallout from cancelled bookings has presented the travel sector with a crisis unlike anything it has seen before. Companies have responded in a variety of ways, from issuing credit notes to upfront refunds, and while UK travellers are legally entitled to refunds within 14 days, the reality is that many operators are buckling under the strain of such seismic revenue loss.

In an open letter to customers, Mark Tanzer, CEO of the UK travel association ABTA, asked them for flexibility while it holds out for government support. "We fully understand and sympathise with the frustration that many customers may be feeling. But if companies are forced into bankruptcy, it will not only destroy livelihoods but extend the refund delays far beyond



the term of refund credit notes," he wrote.

When this crisis does pass, we can expect to see much greater demand for flexibility in booking policies, and more travellers booking direct with operators to ensure this. In the wake of coronavirus, nearly all airlines have waived change fees temporarily, bringing into relief those with pre-existing no-fee policies, such as

Southwest Airlines, which went even further to extend the usual year that passengers have to use their travel credits until June 30, 2021. Hilton and Marriott are also allowing guests to cancel reservations at no charge, while Airbnb has agreed to either refund cancellations or issue travel credit, providing guests can show supporting documentation that their stay was made impossible by coronavirus.

In the future, customers will be less inclined to book travel requiring a deposit, and are likely to exercise greater scrutiny over an operator's cancellation policy. Founder of private travel club Little Emperors Rebecca Masri says: "People won't mind paying a little extra for the comfort in knowing that they can cancel should they need to. I can't imagine

prepaid offers on third-party websites being so popular anymore." But now, third parties such as Expedia are responding to this demand for flexibility. Global PR director Nisreene Atassi says: "Expedia is working hard to enhance our user experience so that refundable hotels are more prominent when searching. Just look for our 'free cancellation' messaging throughout to

help identify the flexible hotel offerings."

Loyalty scheme redemptions will be more important than ever, as travellers take greater caution when parting with their money. Although brands might want to limit loyalty redemptions after such a long stint without revenue, it's true that customers will return to companies they trust, and increasing their buying power and opportunities to earn points at such a volatile time could cement their loyalty. Hyatt's World of Hyatt credit card partnership with US bank Chase has suspended its forfeiture policy, where cardholders lose their points after two years of inactivity, until December 31. Hilton has also announced that Hilton Honors members due to have their status downgraded will receive an extension through March 31, 2021.

DREAM TRIP PLANNING

After an extended period of being grounded, bored and frustrated consumers will be ready to invest in thrilling, once-in-a-lifetime adventures

By Rose Dykins



DREAM TRIP PLANNING

Next year and 2022 will be the years for dream trips (for those who can afford them), reflecting huge pent-up demand for travel after drawn-out restrictions on freedom.

Living through a pandemic has sparked a re-evaluation of people's priorities and attitudes. For many of those confined to their homes during lockdown, it has been a time to make plans.

Zina Bencheikh, managing director EMEA for Intrepid Travel, told *Good Housekeeping*: "In 2021, the top three destinations our customers are re-booking are Peru, Ecuador – mainly driven by the Galapagos – and Antarctica."

Needless to say, the crisis has also been a stark reminder not to take travel for granted. Just as consumers are turning away from fast fashion, tomorrow's travellers will

invest their budget in less frequent, experience-rich, low-impact trips that align with their values.

They will probably stay abroad for longer periods and even take exotic sabbaticals (a trend Globetrender predicted in its *Future of Luxury Travel* report). We will see modest mini-breaks swapped for blow-out bonanzas after summer 2020 was "cancelled".

"People are using this time to dream up the kind of big bucket-list trips you never normally get around to planning," says Tom Marchant, co-founder of Black Tomato. "We are seeing this reflected in recent bookings to Argentina for this winter's solar eclipse; to Iceland to see the Northern lights and to places like Angama Mara in Kenya for the ultimate safari trip."

Like Black Tomato, other companies are launching covetable new

itineraries and tours to capture the imagination of grounded travellers, tempting them to take the plunge and book something extraordinary. During lockdown in the UK, Kuoni launched a new Wildlife of India tour for 2021, a 12-night trip to two of India's lesser-visited national parks that inspired Rudyard Kipling's *The Jungle Book*.

Optimistically, Atlas Ocean Voyages is a "next-gen cruise line" debuting its first 196-passenger expedition ship next year. It says that being a new, small, boutique player in the decimated cruise sector could prove an advantage, as it will be able to "ensure a safe environment for cruise guests from day zero". It will avoid crowded, mass-market destinations and instead appeal to travellers with adventurous streaks with its Patagonia and transatlantic journeys.



Taking the time to really indulge in travel will be compensation for time spent under house arrest. With this in mind, the leisurely pace and cultural immersion of luxury rail itineraries means they are likely to thrive. For example, launching in February 2021, Golden Eagle Luxury Trains' 22-day Trans-Siberian Winter Wonderland Trip traverses

no less than eight time zones and 6,200 miles of frozen wilderness. The first steam-powered winter trip from Golden Eagle, the journey will offer sleeper cars, butler service and an onboard doctor, while stop-offs will include Sretensk – one of the most remote towns in Siberia – and Irkutsk, known as the Paris of Siberia.

Although construction

has been on pause, the Kruger Shalati Train on the Bridge (pictured on previous page) is set to debut at the end of 2020. It's a luxury boutique hotel housed within a stationary steam train, anchored permanently on the Shalati Bridge in South Africa's Kruger National Park. Guests can admire wildlife below from the overhanging pool.



INVOLUNTARY UNDERTOURISM

With 'overtourism' a defining problem of the last decade, the early 2020s will be about building visitor numbers back up and recouping losses

By Jenny Southan



Last year, one of the biggest problems the world faced was "overtourism", whereby thousands of people were descending daily on ancient sites, beautiful beaches, quaint towns and natural beauty spots, and – basically – ruining them. It was the year that

Venice banned big cruise ships; four-hour time slots were implemented at Machu Picchu in Peru; and Amsterdam told outsiders to go to other parts of the Netherlands instead. Now, none of that is relevant as everywhere is quiet and empty.

According to the World Travel and Tourism Council, 2020 was going to be a bumper year. Tourist destinations were predicted to achieve 1.6 billion international arrivals globally, with spending providing ten per cent to global GDP. However, the United

Nations World Tourism Organization (UNTWO) has warned of an 80 per cent drop in international arrivals for this year.

The industry is facing its worst crisis since records began in 1950, meaning "Involuntary Undertourism" is the new trend to contend with. The UNTWO says that – worst-case scenario – the Covid-19 pandemic threatens the livelihoods of as many as 120 million people who directly depend on tourism for employment, as a result of the loss of up to 1.1 billion tourists. This translates to a

potential financial drop in tourism export revenues of US\$910 billion, to US\$1.2 trillion.

While this is undeniably terrible, there is some good coming out of the situation, and it is important for those working in the industry to all think creatively and

use this hiatus as a time to construct new and better business models.

It is proving an opportunity for the environment and wildlife to recover, for the atmosphere to re-oxygenate, for town-planners to improve infrastructure, restaurants and hotels to think more carefully about civic responsibility, and the public to be more discerning about how often they jump on a plane.

Over the next year or two, we can expect older tourists to shun crowded places in favour of more remote, natural environments with lots of fresh air. Weekend city breaks will be shelved, at least for the mid-term (the hassle of flying and the risk of contagion simply won't be worth it). People will book trips for a minimum of two weeks, if not a month

or longer (they might have annual leave to use up), and combine it with remote working or even a sabbatical. Younger millennials and Gen Zs (see page 42) will be more carefree so may be ready to whizz off to Ibiza given the smallest chance.

Overall, tourist boards will be working hard to win back a portion of the visitors they were expecting this year, even if they have to rely on bulking up earnings from domestic travel.

The big reset, though, should in some ways be considered a gift – the travel industry has an opportunity to start from scratch and operate more responsibly. Greed mustn't be part of the equation if it is to ensure sustainable travel for the future but the immediate priority will no doubt be generating income whatever the cost.

GLOBAL TOURISM DATA

THE 30 COUNTRIES THAT RELY MOST ON TOURISM

Where is the place that relies most on tourism in the world? According to the World Travel and Tourism Council, it's Macau, where more than 90 per cent of its GDP comes from people coming to play in casinos and live the high life at glitzy hotels.

The Covid-19 pandemic has decimated the global travel industry, but some destinations are facing more of a crisis than others due to their economic reliance on tourism.

To put this into perspective, income from tourism and travel represents just nine per cent of the UK's GDP and 8.6 per cent of the US's (putting them in 93rd and 98th position, respectively, in the global rankings).

Here are the top 30 locations globally that will need an influx of big-spending visitors as soon as it is safe to welcome them...



[Data is from the World Travel and Tourism Council. It includes direct, indirect and induced impacts of travel and tourism]

*Other Oceania includes American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), Nauru, New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa and Tuvalu

Rank	Economy	Total T&T GDP as % of total economy GDP
1	Macau SAR, China	91.3
2	Aruba	73.6
3	UK Virgin Islands	57.0
4	Maldives	56.6
5	US Virgin Islands	55.5
6	Bahamas	43.3
7	Antigua and Barbuda	42.7
8	St Lucia	40.7
9	Grenada	40.5
10	Seychelles	40.5
11	Cape Verde	37.2
12	Belize	37.2
13	Anguilla	37.1
14	Dominica	36.9
15	Vanuatu	34.7
16	Fiji	34.0
17	Montenegro	32.1
18	Jamaica	31.1
19	Barbados	30.9
20	Other Oceania*	28.6
21	St Vincent and the Grenadines	28.6
22	St Kitts and Nevis	28.2
23	Cambodia	26.4
24	Georgia	26.3
25	Cayman Islands	25.2
26	Philippines	25.3
27	Croatia	25.0
28	Former Netherlands Antilles	23.5
29	Iceland	22.8
30	Albania	21.2

The background features a series of thin, wavy, pink lines that create a sense of depth and movement, resembling a stylized wave or a series of overlapping planes. The lines are set against a dark blue background. The text is positioned in the upper left quadrant of the image.

CASE STUDIES
VOICES
INTELLIGENCE

CASE STUDY: AIRBNB

Airbnb has been hit hard by Covid-19. It recently downsized its global team by 25 per cent, while its year-on-year revenue is forecast to fall by 50 per cent. As a result, the home rental company has been forced to scale back investment in its upcoming Hotels and Luxe products, while “pausing” its Transportation and Airbnb Studios projects (there was talk of it launching its own travel TV Studio). However, Covid-19 also presented an opportunity for Airbnb’s foray into the virtual travel sector, by doing a version of Airbnb Experiences for the digital realm.

Launched within the space of two weeks, Airbnb’s Online Experiences are now reportedly the company’s fastest-growing product – surpassing the offline Airbnb Experiences and

its home and apartment rentals. Ranging roughly between £15 and £40, consumers pay to immerse themselves in a local experience held over Zoom by an Airbnb host, be it something artistic, cultural, culinary or athletic. The options are as diverse as the hosts themselves; options include “Dance Like a K-pop Star” (£18) in South Korea, “Guided Meditation With Sleepy Sheep” (£13) in Scotland and “Sangria and Secrets with Drag Queens” in Portugal (£27).

During lockdown, some hosts have reportedly made thousands of dollars per day.

The success of Airbnb’s Online Experiences lies in the accessibility and rare feel of the product. Airbnb has created a low-price, high-volume product for the virtual realm using its existing physical inventory, one that is tailored to what consumers are seeking right now – unique, interesting virtual travel experiences with a sense of discovery and human connection, at a

relatively low cost (and accessible over Zoom, which has become a staple of people’s virtual work and social lives during the pandemic). “This crisis has sharpened our focus to get back to our roots, back to the basics, back to what is truly special about Airbnb – everyday people who host [in] their homes and offer experiences,” says Airbnb’s CEO Brian Chesky.

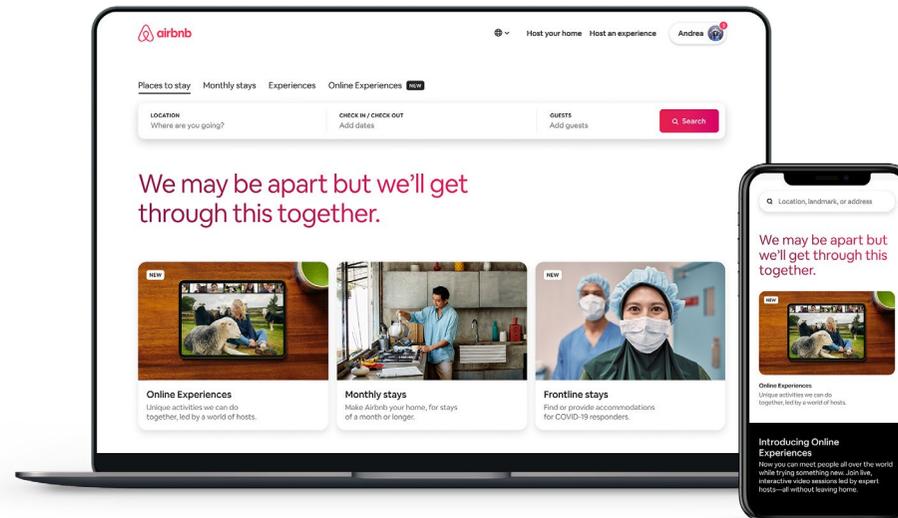
As a pioneer of the sharing economy, Airbnb’s launch in 2008

appealed to millennials’ desire for affordable travel with high cultural immersion. Post Covid-19, the seclusion of private Airbnb residences – particularly those that have their own self-catering kitchens – may seem preferable to a hotel. On the other hand, customers may feel less inclined to stay in the home of a stranger that does not have to submit to the intense new cleaning standards imposed on chain hotels. Standardising the quality

of its accommodation has always been a challenge for the company, and that will also be the case for the cleanliness across its six-million-strong global network of listings.

Still, Airbnb recently launched its Enhanced Cleaning Initiative, the first standardised sanitisation protocol for the home-sharing sector. Airbnb hosts will be trained and certified in how to prevent the transmission of Covid-19 in their properties, including the use of PPE (personal protective equipment) for cleaners. The company is also allowing its hosts to block out their properties from bookings for 72 hours, guaranteeing a set amount of time between visitors, so guests arrive feeling confident that enough time has passed since someone last used the space.

BY ROSE DYKINS



CASE STUDY: NEXT-GEN PPE

Catering to the needs of nightlife and entertainment sectors, creative studio Production Club has designed a hazmat suit (pictured) that safely allows people to interact in close proximity. Comprising an airtight top suit and helmet, the Micrashell has a number of functions designed to facilitate social and party environments, with a built-in sound system, wireless voice communication and a disposable drinks and vape system.

"After witnessing the events industry fall into an unprecedented recession, and seeing large groups of people ignore social distancing directives in order to go out and party, we felt obligated to address both issues and find a solution that benefited all," says Miguel Risueño, the studio's head of

inventions.

Made from high-performance and cut-resistant fabrics, the "top only" suit design lets users wear their normal clothes and interact as they might ordinarily without being exposed to respiratory infection.

Will it actually come to market? Risueño tells Globetrender: "We

foresee a high adoption rate as Micrashell addresses a major human need that requires a prompt solution. We've had various industries such as film and construction reach out."

Innovation in personal protective equipment (PPE) is one aspect of our "new normal" that we can expect to see much more

of as social distancing measures persist. When it comes to travel, AirAsia has been one of the first airlines to roll out a new uniform that integrates PPE created for cabin crew flying on repatriation flights. Designed by Filipino designer Puey Quinones, the hot-red full-body suit covers flight attendants from head to

toe in a "breathable yet sturdy material", complete with plastic face shields and described by the airline's vice chair for the Philippines Sheila Romero as a "fusion of fashion and safety [that] will define the new standards of flying".

Philippine Airlines also debuted a full-body suit – a white ensemble featuring the colours of the national flag across one shoulder – on a recent repatriation flight to Auckland from Manila. Designer Edwin Tan says: "We used a non-porous material for the PPEs – a material with substantial weight to give it a better fall than generic PPEs." Slightly less jazzy but no less utilitarian, Emirates has given crew disposable gowns to wear over their uniforms, alongside the now standard masks, a safety visor and gloves.

Passengers will also be required to wear PPE

when travelling, with many (if not all) airports, airlines and train operators mandating face masks.

As a consequence, demand has exploded. At the beginning of the year, Chinese online retailer Taobao sold 80 million masks in just two days. By 2026, the global disposable face mask market is expected to be worth more than US\$26 billion. (People in the West will continue to use masks as part of their daily life, just as the Japanese have for years.)

Cashing in, a host of fashion designers have pivoted their businesses to create stylish "facewear", such as New York-based brand Collina Strada, which crafts masks from surplus material. Meanwhile, Deco Travel Collection sells an anti-viral jumpsuit and mask combo.

BY MARISA CANNON



CASE STUDY: HONG KONG

Tourism in Hong Kong has suffered a catalogue of setbacks over the past 12 months, from the pro-democracy protests which began last summer to the all but devastating economic impact of the global pandemic. In 2018, Hong Kong was the world's most-visited city, welcoming 65 million visitors, but by the end of 2019 this number had sunk to 56 million.

"Travel bans resulted in the complete collapse of tourist visits, which fell by 81 per cent year on year in the first quarter of 2020," says Rajiv Biswas, Asia-Pacific chief economist at IHS Markit. "This has created a massive economic shock for Hong Kong's tourism industry, hotels and airlines." Indeed, by the start of April this year, the number of visitors had dropped to below 100 a day.

But as the Asian hub celebrated its containment of the virus, the Hong Kong Tourism Board became one of the world's first to announce a recovery plan to attract visitors back to the territory. The board's chairman YK Pang told attendees of a web conference that this was "an ideal time for us to review and rethink Hong Kong's position in the global tourism market and elevate service standard", allocating a US\$51 million stimulus package to the sector once travel restrictions are lifted. It is also consulting with stakeholders such as hotels, inbound agencies, retail and restaurants for guidance on its repositioning, with plans to appoint a branding agency later on.

Pang added his predictions that the tourism landscape would look very different post-Covid. "In the post-

pandemic world, we will see a shift in preference and behaviour among travellers – the public health conditions of destinations and the hygiene standards in transport, hotels and other tourism facilities will become a top priority; people will prefer short-haul breaks and shorter itineraries; wellness-themed trips will become a new trend."

The three-phase recovery plan will initially

encourage locals to rediscover parts of the city and communities with which they might not have come into regular contact, the aim being to galvanise grassroots messaging that will restore confidence and inspire intrigue among foreign travellers. The tourism board will then introduce a series of promotional offers in overseas markets as interest in international travel picks up, before

launching a new brand campaign and inviting mega events to return.

Since the launch of Hong Kong's recovery plan, European Cities Marketing (ECM) – the professional body for tourism and convention bureaux – has published its own guidelines on sustainable recovery. Core to ECM's report is a re-evaluation of the types of visitors that each European city might want to attract,

and the nature of the jobs and businesses that those visitors will create and support. It provides a clear structure for each phase of a city's recovery, and a framework for stakeholders to assess how consumer decision-making might change post-Covid, asking what hidden strengths and learnings can be gleaned from the crisis once stability returns.

BY MARISA CANNON



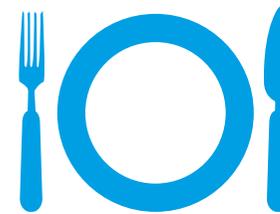


ON TOURS

George Morgan-Grenville, founder and CEO, Red Savannah

"With so many 2020 bookings postponed until 2021, we are already seeing signs of accommodation options being full, especially in national parks. This will likely

limit recovery and growth for all travel companies in 2021, as two years of travel are going to be combined into a single year. We will see a migration to low-density tourism, away from city centres. Resorts with tented safari camps, boutique lodges and private villas will all thrive. A higher-cost, lower-density model will likely be the strategy of choice."



ON RESTAURANTS

Jason Atherton, chef and restaurateur

"Fine-dining will not look like it used to for a long time. Part of the magic and allure comes from more than just the Michelin-starred food we plate up.

"Impeccable service, a knowledgeable sommelier sourcing wines from around the world, access to incredible produce and suppliers up and down the country and, of course, the atmosphere and vibe the restaurant has from the guests that fill the dining room will all be things we need to consider and things that will not be possible.

"The future of fine-dining may look to be more intimate with the rise of private dining and catering, but accessibility to this then becomes another issue. We don't want it to become this elite thing that not everyone will have the chance to enjoy."

ON TRAVEL INFLUENCERS

Chris Donnelly, founder and CEO, Verb Brands

"We can confidently say travel influencers will continue to have a presence in marketing strategies in the future. The advice for both influencers and brands alike is similar: create content that is authentic and sensitive. It's challenging to achieve this without being seen to 'woke-wash', but we're in a time where we're all hyper-aware of this 'new normal'.

"We are urging brands to speak from a place of purposefulness and use their influence to spread positivity. Brands should be looking to go one step further and funnel this into meaningful action and positive change. One thing for certain is that brands and influencers will have to adapt to a less commercial tone moving forwards, and one of the clear outputs from this will be a heightened sense of sustainability within travel."



ON YACHTING

Jimmy Carroll, co-founder, Pelorus

"We have always seen our guests looking for the rare and the remote, and are expecting to see a surge in these enquiries. We see endless possibilities for adventure in the Kimberley (Australia), Raja Ampat (Indonesia) and Papua New Guinea, as well as closer to home, in Norway, Scotland and the Baltics, and are excited about bringing these expeditions to our international clients. We also expect greater requests for doctors onboard and for Covid-19 deep cleans and onboard testing to ensure all of the crew and guests are fit and well."



ON ADVENTURE

**Brian Young, managing director,
G Adventures**

"Once restrictions are relaxed and the FCO advice is lifted, the desire to travel will drive holidaymakers to 'approved' countries, most likely within Europe to begin with. However, we are seeing interest in trekking around Patagonia and Kilimanjaro, and hiking to Everest base camp ranking highly among the trips searched for by travellers at the moment, indicating there may also be a desire to go out and tick off those 'once-in-a-lifetime' trips that have been on the list for years."



ON BIOSECURITY

Bradley Williams, director, Unique Group

"Travellers will soon become accustomed to seeing fever-screening cameras positioned on tripods or as permanent fixtures at airport terminal entrances, allowing border and security teams to prevent passengers with a high temperature entering the airport. The technology will also be present at staff entrances, ensuring that pilots, cabin crew or terminal staff do not come into contact with colleagues who may be carrying the virus. Although social distancing in hotels is far easier to implement than on transport, it may well become a standard part of the check-in process to be screened for a fever."



ON VILLAS

**Huw and Rossella Beaugié, founders,
The Thinking Traveller**

"Reconnecting with loved ones after an extended period of separation will be a top priority. More customers will be seeking holidays that provide

an intimate experience, which villa holidays can expertly cater for. We are fortunate that our portfolio of villas in the Mediterranean can offer this, alongside stunning sea views and direct beach access. They also offer the same services as a hotel, such as a private chef and housekeeping.

"We know that after months of cooking and cleaning at home, many people will be looking forward to having someone to cook and clean for them. Cleanliness has always been paramount for us but now we are implementing some very specific policies to ensure our guests' safety. For example, we will ensure all of our cleaners wear masks, and in order to carry out a deep clean of each villa before and after each stay we will extend the time between check-out and check-in."



ON LOW-COST CARRIERS

József Váradi, CEO, Wizz Air

"The impact of Covid-19 on aviation has been profound, with travel restrictions causing a drop in passenger numbers and mounting pressure on airlines' cash flow. However, low-cost carriers could

be well positioned to recover from the crisis, through enhanced hygiene measures, low fares and market consolidation.

"Only the most resilient carriers will survive, resulting in new market opportunities as demand increases for locations that have been exited by rival carriers. Wizz is leading the way, with its new era of sanitised travel and as the first European carrier to gradually reintroduce operations. We feel confident about the future of flying as we begin to put infrastructure back in the air and stimulate demand with our ultra-low fares."





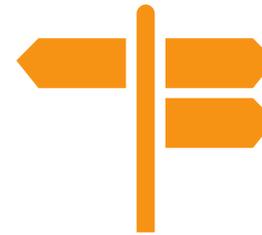
ON HOSPITALITY

Sébastien Bazin, CEO, Accor

"Beyond a total standstill of the hospitality industry, there lies in the coronavirus crisis new opportunities for hotels in the future. While the economic and financial impact is extremely challenging and recovery will take time, new

hotel norms will arise. Enhanced cleanliness and hygiene practices as well as new tech and digital platforms will definitely be a legacy of this crisis for a long time, and you will see Accor playing a leading role in structuring these new standards and solutions globally.

"Covid-19 has also escalated the overall concern about sustainability and social issues. Consumers will be looking to travel in a more responsible and meaningful way. Hotels will need to calibrate their offers and services adequately and play an active role in CSR and environmental matters, thus matching new guest requirements."



ON TOURISM

Adam Ewart, founder and CEO, Send My Bag

"Consumers will travel to lesser-known destinations that have been less affected by coronavirus or where restrictions are more lenient. In Europe, destinations such as Denmark, Austria, Germany and Switzerland will likely be among the first to lift travel bans as they have already started to roll back lockdown procedures.

"Another option farther afield is Thailand. Although it has a ban on all foreigners from entering the country while it tackles the spread of coronavirus, with the number of cases and deaths decreasing, it is not inconceivable that tourists could be letting their hair down at a full moon party later this summer."

ON INTERIOR DESIGN

Nigel Goode, co-founder, designer and director, PriestmanGoode

"There has been a lot of R&D in materials for aviation over recent years, including in the development of antibacterial and antimicrobial finishes. This will become even more important now, and not just in aviation, but also in the broader hospitality sector. I think in the short term, it'll be about adding antimicrobial finishes to existing products. The long-term goal will be to develop materials that meet both hygiene and sustainability requirements."



ON CRISIS MANAGEMENT

Rob Pinker, chair of emerging markets, Brunswick Group

"The speed of response and the sustained visibility of leadership throughout a crisis are non-negotiables. Get it right, and it can redefine reputation for the good; get it wrong, and it becomes an indelible ink stain with far-reaching consequences and a long recovery time.

"In many ways the mindset matters as much as the method. Technology gives us speed and visibility, and the Covid-19 crisis has made even the most analogue of audiences more intuitive users and consumers of technology. But for many crisis situations, there is a point where leadership standing tall on the ground is what is needed to instil confidence and own the problem – and often without that, even the most sophisticated technology will not save your reputation."



1. ETHICAL SEARCH ENGINES

Travellers will plan their trips using search engines that fund the greater good. Ekoru, FlyBarbara and Ecosia Travel all donate a percentage of their advertising income to eco charities – 100 per cent of the latter's commission profit goes to tree planting (around 26 are planted per booking).

2. MICRO HOTELS

After social distancing for so long, travellers will seek accommodation that feels secluded. Self-contained micro hotels allow for this – Birdbox by

Livit is a cabin/hotel room hybrid for just one or two people to sleep in amid Norway's wilderness.

3. TRAVEL AVATARS

We won't need to explore faraway places by being there in person – robots will go for us and report back. Newme robots transmit 2K videos directly to human users so they can see and interact with the bot's surroundings.

4. PERSONAL CARBON ALLOWANCE

We'll track our carbon footprint in the same way we count calories or monitor our screen

time. Swedish fintech company Doconomy recently launched its "Do Black" card with Mastercard, which prevents cardholders from purchasing when they've reached their monthly CO2 allowance.

5. UV TURNDOWN SERVICE

To deliver next-level cleanliness, robots will become hotel room germ-busters. US-based tech company Xenex builds LightStrike bots that beam "intense germicidal" xenon light to kill pathogens, and they're already at work in some hotels in the US.

6. SOLO-WORKING HOTEL ROOMS

While the population feels wary of coworking, but longs to break free from homeworking, hotel rooms will be rented as personal offices by day. Hotel brands including Accor and Zoku already offer this

service, and the latter's Private WorkLofts also have their own kitchens.

7. ZOOM TRAVEL AGENTS

Travel agents will use Zoom to help customers plan their holidays remotely. "The need to stay at home has changed people's perception of, and familiarity with, video calling," says Derek Jones, managing director of Kuoni, which has launched a video appointment service.

8. TOUCHLESS ENVIRONMENTS

Low-touch living is the way forward, which means more automation. We'll forgo cash for cleaner contactless payments – like in Amazon Go stores, where customers simply take groceries and leave. We'll unlock hotel rooms with our phones and pat downs at the airport will be replaced by walk-through scanners.



9. ANTI-VIRAL INTERIORS

Post-pandemic aircraft cabins and hotel interiors will feature antibacterial surfaces. Viruses can only survive on copper for four hours, for example, (unlike steel, upon which they can live for two or three days), while companies such as Bio-Fence are developing antimicrobial coatings that can be applied with a spray.

10. DRONE DROPS

Autonomous drones will drop deliveries, food and medicine supplies directly to our doorsteps.

Google Wing flies 400 feet above the ground (so skips traffic), emits zero carbon and uses machine learning to avoid trees, buildings and power lines.

11. HEALTH CONCIERGES

Luxury hotels will have healthcare professionals dedicated to guests' individual concerns, accessible just like a concierge service. Le Bijou apartments in Zurich have launched a 24/7 personal health-monitoring service that guests can call upon if they feel unwell. They even offer in-house coronavirus testing.



12. BESPOKE TRAVEL INSURANCE

Rather than searching for an annual deal, we'll invest in watertight, tailor-made travel insurance. The Greek Villas has partnered with Lloyd's of London to launch this for its guests booking for 2020 – with 94 per cent of a full refund if a booking is cancelled.



13. STATEMENT FACE MASKS

Fashion-forward face masks are on the way from the likes of Louis Vuitton, while Kempinski is rolling out floral print masks for its hotel staff. Meanwhile, Phyne's EU flag masks exemplify how PPE can make a political statement.

14. VIRTUAL INFLUENCERS

CGI influencers will be more ubiquitous as restrictions on real-life travel persist, because they can be anywhere, anytime, and can be

programmed to align with a brand's values. They also come at a fraction of the cost of a human influencer.

15. HOTEL-HOME ROOM SERVICE

Hotel-to-home room service may see greater interest as travellers seek five-star fare without the infection risks of dining out. Hotel Kämp in the Finnish capital offers 24-hour deliveries of salmon soup and Carelian Caviar.

16. ROBOTS IN HOSPITALITY

Hotels worldwide will

increase their adoption of robot hotel staff, following the example of Hangzhou's FlyZoo Hotel and Hotel Jen in Singapore, which use robots to deliver amenities and room service, plus in-room smart assistants to answer simple voice commands.

17. DOUGHNUT ECONOMICS

This economic model centres on the notion that no person should fall short on essentials such as food, housing or healthcare, while ensuring that we don't overstretch our environmental systems, which include a stable climate, fertile soils and a protective ozone layer.

18. FOREST CITIES

Cities are tackling the climate crisis and air pollution by planting millions of trees, from Cancun's Smart Forest City, which will see an equal ratio of plants to

people, to LA's pledge to plant 90,000 trees by 2021.

19. POP-UP BIKE LANES

Temporary cycle lanes are popping up across Europe to help larger numbers of cyclists to comply with social distancing, with road markings in Berlin being redrawn and a new cycle network set up for vital routes across Budapest.

20. SMART GENEROSITY

Coronavirus has sharpened our focus on social responsibility, compelling businesses to invest in causes that put the needs of stakeholders above short-term gains, such as giving employees extra benefits or collaborating creatively to manufacture PPE.

21. YIN-YANG BOOTH SEATS

New airline seat designs with plastic partitions could be the new norm, isolating passengers by

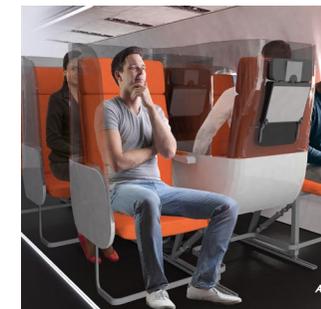
reversing the middle seat, and installing a transparent guard that wraps around the seat's shell.

22. KONMARI METHOD (AT WORK)

Finding ways to delineate our home and work lives is more important than ever, and in her new book, *Joy at Work: Organizing Your Professional Life*, Marie Kondo outlines ways to achieve clearer career and daily work goals by organising digital data, categorising contacts and setting priorities.

23. REMOTE CROWDS

Brands are finding innovative ways for users to interact virtually on their



platforms, from Netflix Party, where viewers can host long-distance movie nights, to Covid Room – "pioneers of e-clubbing and e-exhibition".

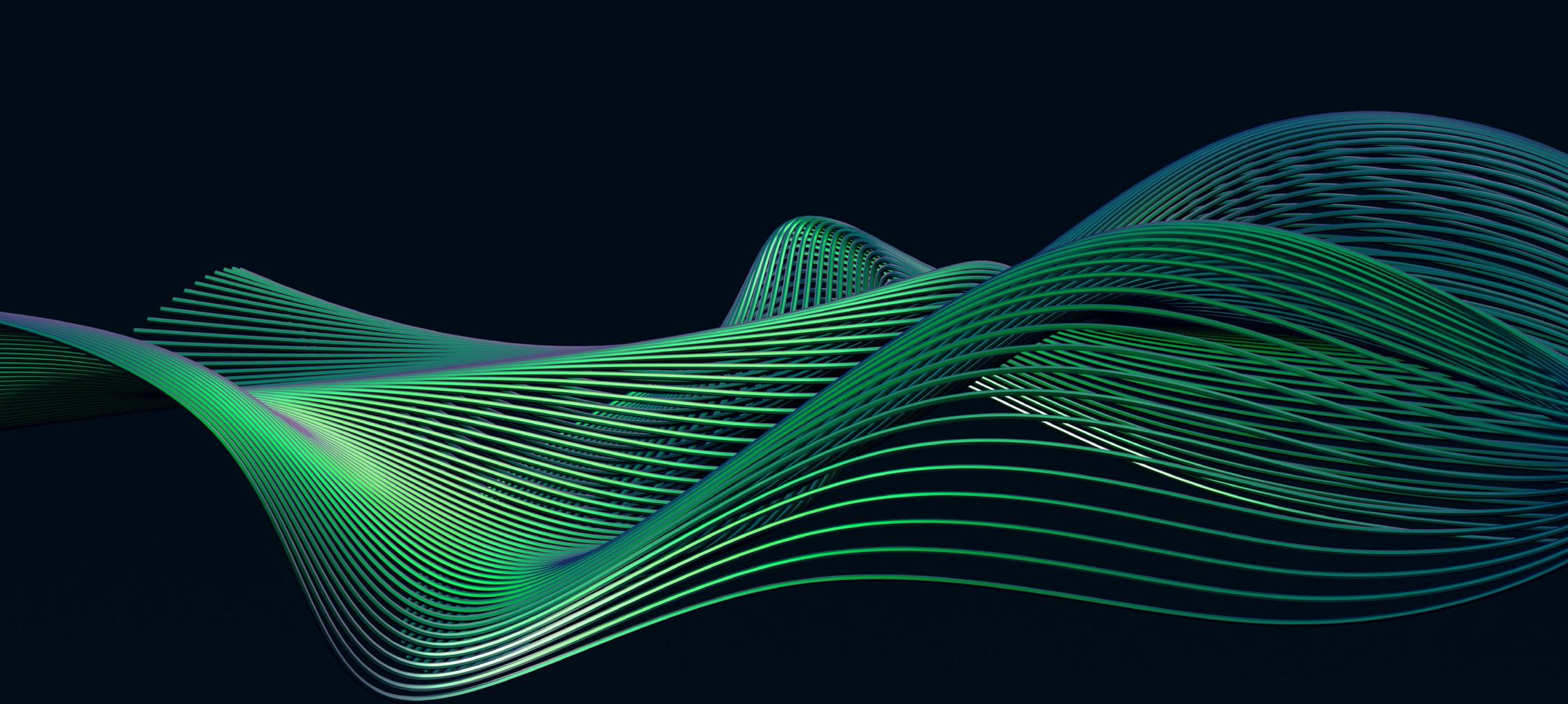
24. BORDER TESTING

"Point of need" tests, where ultra-low concentrations of Covid-19 are detectable within minutes, are currently being developed by a number of biotech labs. Once available, border authorities will be able to more easily filter healthy passengers.

25. VALUE VOUCHERS

Vouchers are an ideal way of enabling people to secure discounted trips, along with providing much-needed cash for companies. Porter & Sail offers Hotel Credits (for example US\$1,000 for \$1,500 to spend at Papaya Playa Project, Tulum), while Ace Hotel is selling "pay now, stay later" gift cards for stays at US properties.

DEEP DIVES



DEEP DIVE: GEN Z

“If I get corona, I get corona, at the end of the day I’m not gonna let it stop me from partying.” This was how spring breaker Brady Sluder justified his attitude to the pandemic that has been tightening its stranglehold on the world since the start of the year. When coronavirus first crept into our collective consciousness, it was young people who failed to flinch. Generation Z, aged 16 to 25, felt invincible, flouting social distancing rules and capitalising on tumbling flight prices to visit long-distance friends and family.

Generation expert Dr Eliza Filby says this cavalier attitude was mostly down to the invincibility that young people feel generally, but it was also a result of the lack of immediacy that the virus presented to their lives. “It was clear from

early on that this virus was age-discriminate, it was attacking people with existing health conditions, but predominantly the elderly. Gen Z are in their 20s, with parents in their 40s and 50s, so they’re not in the vulnerable group. They may have grandparents who are, but it’s also whether they know people that have died, or that they’re

worried about. If you’re under 25, you’re invariably less likely to be in that situation.”

They’re also the generation that feels most removed from the more conservative values of their elders, with feelings around activism and social injustice instead more widely shared, so much so that the meme “BoomerRemover”

was trending in the first few weeks of the pandemic. Despite their political anger and initial nonchalance, this pandemic is likely to define Generation Z for the rest of their lives. “Generations are often defined by world events that happen in their youth,” explains Filby. “Whether it’s the Second World War, the 1960s

or the Millennium, for Generation Z this is really their moment.”

Digitally native, adventurous and future-facing, Gen Z is uniquely equipped for a crisis of this nature, where video-conferencing has become the norm and agility in business is vital. It’s likely that once the pandemic lifts, this demographic will feel less anxiety than others to return to work and travel.

At the FlightPlan virtual conference in April, behavioural scientist Rory Sutherland spoke of Generation Z’s “incredible need to travel”, observing that his own children “don’t see it as a privilege – they kind of see it as a right”. Indeed, 25-year-old digital editor Hannah Ralph echoes this sentiment: “The pandemic wouldn’t stop me from travelling. This might be super naive, but I would simply try to

avoid countries that were the worst-struck, and I’d be conscious of personal space and handwashing.”

Generation Z will continue to be one of the most important groups for travel brands post-coronavirus – today, they make up 32 per cent of the global population and have buying power equal to US\$143 billion in the US alone. What this pandemic is likely to bring into sharp relief, however, is a more cautious approach to spending, especially for Gen Z who face volatile job security and less disposable income than older generations.

According to a First Insight survey, 41 per cent of Gen Z said they’re cutting back on spending in preparation for coronavirus, compared with 40 per cent of Millennials, 36 per cent of Gen X and 23 per cent of Baby Boomers. However, a comprehensive travel





insurance policy may be enough to get Gen Z to reconsider their holiday plans once restrictions lift, according to a GlobalWebIndex report.

Before the pandemic, Gen Z's travel priorities were rooted in a desire for cultural immersion and a search for authenticity, which has in turn founded a more heightened awareness of the environmental effects

that tourism can have on the planet.

Apprehension in the months preceding lockdown, alongside a desire to sustain the environmental benefits that it triggered, will likely spur Gen Z to pursue domestic travel first. "At the moment when I've talked about travel with family and friends, it's more around doing something in the UK,

rather than abroad," says 24 year-old content strategist Isabella Speight.

Filby says that after coronavirus, Gen Z will reflect even more on their environmental impact and will be more open to methods that convey a similar experience but without the damage, such as virtual travel. "Train travel, too, will be huge," says Filby, alongside other means of

alternative transportation that have a reduced carbon footprint.

Of all the generations, Gen Z are the most tuned in to issues around social responsibility and the deeper considerations behind travel. According to YouthSight data, 44 per cent either "strongly agree" or "agree" that they think a lot about the environmental implications of their holidays. In the post-coronavirus age, travel brands that foster initiatives with local communities and invest in conservation will garner the most attention from this age group.

Sam Bruce, founder and CMO of adventure travel outfit Much Better Adventures, says: "There was plenty wrong with the travel industry pre-Covid. Post-Covid will provide a good opportunity to hit reset and make things better, fairer and more sustainable. Good tour

operators not only respect those ecosystems and communities but actively work to protect and nurture them."

There will be plenty of unknowns to tackle when international lockdowns start to ease, and while travel has suffered a tremendous blow, history shows that the sector has bounced back from wars, terrorism, recession and natural disasters, and it will again. What we can

assume is that the older people get, the more likely it is that this virus will spur them to stay at home, while younger people will be more willing to seek out adventures and the meaningful connection that travel can bring. Businesses that can transform their models to appeal to Gen Z will undoubtedly triumph in the long run.

BY MARISA CANNON



Download Globetrender's *Gen Z Horizons: Travel in 2020 and Beyond* report: £85 + VAT
globetrender.com/downloads

From retreating to moated castles and super yachts to investing in lavish, underground nuclear bunkers with military-grade air filters, the super-rich have put an entirely different spin on what it means to self-isolate. As pandemic living shifts away from confinement to mere social distancing, those with money will be the first to start travelling again for pleasure, secure in the knowledge that their money can buy them safe pathways to where they want to go.

Up until the point when travel bans start to be lifted, wealthy business leaders are generally hunkering down. Jaclyn Sienna India, CEO of luxury travel company Sienna Charles, says: "Our clients are the most wealthy in the world. The people we deal with are CEOs of top companies, so travel is not important

to them right now. They are needed to rally their teams, steer strategy and keep morale raised. There has never been a more important time for them to lead."

However, when constraints on air travel are lifted, we can expect a rapid shift. India says: "We typically do not book trips for clients more than 30 to 60 days out since their schedules are so demanding and ever-evolving, so we would never see bookings for 2021 – like people saving for a whole year to go away. Our clients own or lease private jets and when they say it's time to travel we arrange everything very quickly for them. We are not looking to see an uptick of bookings until quarantines are ended, borders reopened and industries on the right, new, modified plan to success."

This isn't the whole picture, of course. Others are taking pleasure from putting plans in place for trips away with friends and family for the months ahead. Tom Marchant, co-founder of Black Tomato, says: "The vast majority of our clients have been inclined to postpone travel and not cancel outright, preferring to find an alternative time later in the year or in 2021.

"We've seen a growth in family travel, particularly multi-generational holidays at the end of this year and into next year. Aside from UK-based travel, people are setting their sights on sub-Saharan Africa, Canada, Latin America and Scandinavian countries such as Norway and Iceland, where they have easy access to the natural world and vast open spaces."

Unlike budget travellers who tend to



book their own hotels and flights via online channels to get the cheapest deal, high-net-worth individuals are more likely to invest in the advice and service of consultants or agencies who can protect their booking and help them arrange to postpone it quickly and easily.

Cookson Adventures, for example, specialises in high-end adventure travel. "Thankfully, we

do still have interest in booking later in year, often to far-flung places onboard private expedition yachts or bespoke camps in remote conservancies," says Ricardo Gato, the company's marketing director. "Our bread and butter has always been exploring remote destinations, such as Antarctica, Svalbard and secluded islands in the

Pacific. For us, that won't change post-Covid-19." He adds that he predicts this to become a wider trend across the luxury travel industry in the months ahead.

Rebecca Masri, founder of Little Emperors, a private members' club offering special rates and rewards from its luxury hotel partners, has seen a rise in searches for autumn



and winter escapes to natural retreats, beach destinations in tropical climes and island resorts. "The Maldives is picking up a lot of searches, especially for later in the year, as is Costa Rica, the Caribbean and Mexico," she says.

She adds: "I predict people will be less inclined to go to busy places, so I'm nervous for Europe over summer. I

think the Europe we know – the South of France, Ibiza, Mykonos, Sardinia, Monaco – all the trendy hotspots, I'm sure there will remain a market for these places, but it will be smaller than the market we're used to. I think people will be more inclined to do things which actually involve more space, fewer humans and more of a focus on well-being."

At the start of 2020, "flight shame" and a growing concern for climate change was set to motivate people to lower their carbon footprint, but for luxury travellers, this will be the least of their concerns. As a consequence of "germaphobia", we can expect to see private jet usage rocket.

Andy Christie, private jets director for the Air

Charter Service, says there's already been a spike in private jet charters within China. "[The country] has come out the other side, and purely domestic flying has started to increase again," he says. "There are high-net-worths in China wanting to get out of the cities where they've lived in lockdown to their summer houses or other locations where their family may be, and with jets they avoid the main terminals and any large groups."

Although most fleets have been grounded for months, Christie says things will pick up quickly: "The whole of the private charter business is built on short-term demand. On a normal day, within three hours' notice, the crew are at the airport, the aircraft is fuelled and you can depart. The market is built around quite a lot of affluent people who

make snap decisions a lot of time, and money buys you that."

Still, if everyone has the same idea at the same time, jet setters may still find they face some restrictions. "One thing money can't buy is more slots at a small European airport," says Christie. "For example,

the Greek islands aren't always catered particularly well for 50 private jets coming in over a weekend. The airports have to control the slots to limit the number of jets they can physically handle. So they play a significant role."

BY ROSE DYKINS



Download Globetrender's *Future of Luxury Travel Forecast: 2020-2025* (£195 + VAT), which presents 25 emerging trends for the new decade, from Robo Chauffeurs and Supercharged Road Trips to Immortality Retreats and Wilderness Hideouts. globetrender.com/downloads

Paul Charles, CEO of travel consultancy The PC Agency, predicts sweeping change across the luxury travel industry, but ultimately the rich just want to have fun.

They say that absence makes the heart grow fonder, and for the 17 million or so high-net-worth individuals (HNWIs) in the world, each

with over US\$1 million of liquid assets, there's pent-up demand to travel in style again. Especially if they're aged over 60, as missing out on a year of travel is a major deal.

But travelling will change post-lockdown, precisely because those with wealth have had plenty of time to rethink their lives and their needs. Their priorities

will be different. Space and privacy will be at a premium, so it's easy to see how journeys will change.

Airports will become "filtering centres" for the fit and healthy. Passengers on a plane will only be reassured that those around them are not contagious if they know that the airport has temperature-checked

and tested everyone for evidence of coronavirus.

With medical advances, results can now be returned within 30 minutes, meaning that those showing symptoms can be kept in the terminal rather than allowed to proceed to departure gates. With longer queues at airports, short-haul travel by private jet will be more in demand as guaranteeing one's own safety bubble will be the ultimate luxury.

Wealthy jet setters will demand more bespoke services at airports. The buffets in premium lounges will be removed, making way for private butlers, while kerb-to-plane VIP services such as PS at Los Angeles International will be fought over.

With HNWI's desire for space and privacy, luxury urban hotels and resorts will suffer enormously

as, like aircraft, they are not designed for social distancing. Instead, travellers will prefer rural and coastal properties with fresh air.

Villas and cottages will also benefit, although owners will need to invest in super-cleaning regimes, even ensuring 72 hours between rentals to ensure any bacteria has died out.

When it comes to dining, luxury travellers will seek out private chefs. Restaurants with fewer diners will be devoid of atmosphere, so HNWIs will choose to eat in their own surroundings with access to bespoke menus.

Yachts, of course, tick all the boxes, with clean air at sea and crew who have had to quarantine for seven days before guests come aboard. However, operators will need to plan to have more advanced medical equipment onboard – oxygen

canisters and ventilators will be at a premium.

With "safety" the new buzzword in luxury travel, HNWIs will avoid destinations with poor-quality or under-resourced healthcare systems, as speed will be of the essence if anyone is infected. The adventure hotspots of the past, such as deepest South America and parts of East Africa, will look distinctly unappealing to those averse to risk. We can expect hospital-rating systems to be a new metric in determining where to go on holiday.

All this said, the one thing that won't change is the need for trusted advice. HNWIs will want to rely on people with heaps of experience, who will easily be able to recommend the safest places to travel to and the best ways of getting there, so they can get on with enjoying themselves.



DEEP DIVE: THE FUTURE OF TRAVEL PUBLISHING

With global travel bans, a massive drop-off in advertising and the removal of in-flight magazines from planes to contend with, travel publishing (especially print) is facing its biggest challenge yet.

It's no secret that the travel publishing industry was facing an uphill battle prior to Covid-19. Over the past 15 years, its pre-existing business model reliant on advertising revenue, magazine subscriptions and guidebook sales has been turned upside down by the rise of the digital age, the 2008 recession and evolving trends in the way people seek inspiration and guidance when planning their travel.

As has been the case for most industries, for the travel publishing world the pandemic has amplified problems that were

already at play. Between 2007 and 2012, travel guidebook sales fell by 40 per cent globally as they fought to hold their place in an increasingly crowded market – competing with the likes of review sites, travel blogs, apps and booking websites that offered reams of free, current, digestible information at consumers' fingertips.

This has since recovered by 27 per cent, as publishers such as Lonely Planet and Rough Guides worked hard to diversify their offering beyond printed guidebooks, carving out their niche as a source of trusted, in-depth advice from local experts.

But then came Covid-19. In April, the world's largest travel publisher, Lonely Planet, announced it was closing its offices in Melbourne and London "almost entirely", while continuing

to publish guidebooks at its Dublin and Tennessee offices with reduced staff numbers.

Rough Guides, which has been publishing travel guidebooks for 40 years, has yet to reveal how it has been affected by Covid-19, but has been offering free e-book versions of its guides for a limited time.

Now that there's no guarantee when (or whether) their recommended restaurants, attractions or transport links will reopen post-pandemic, the content of many guidebooks could sadly be rendered redundant.

There will always be a niche need for physical guidebooks – a godsend when wifi or phone signal is patchy or pricey – and an audience that appreciates them. But in the uncertain, fast-changing travel landscape we find ourselves in, it's

also critical for travellers to have up-to-date advice they can base their decisions on, which calls into question the format of printed guides published before the crisis.

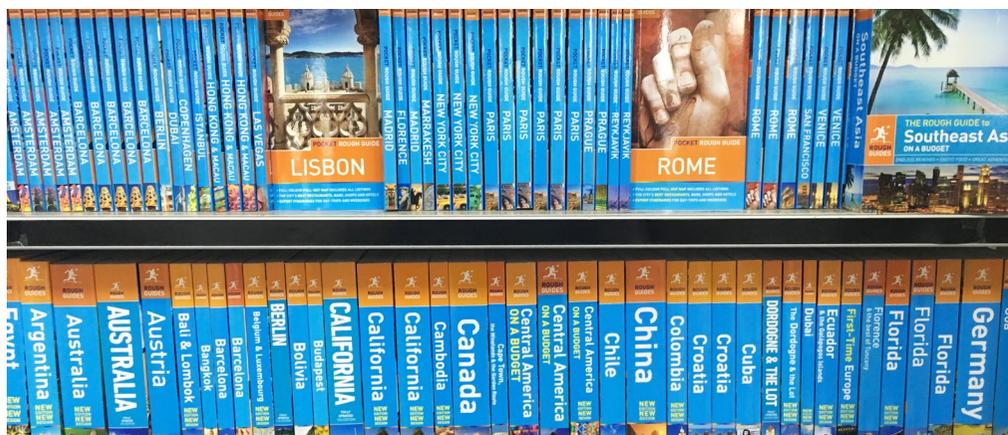
Instead, as certain travel publishers such as Bradt Guides use this period of downtime to introduce new customers to their e-book offering, we will

see them focusing their efforts on finessing their digital output – websites, apps, e-books, podcasts and social media content – which can be easily updated and amended to offer real-time information for travellers, rather than disseminating content with a shorter shelf life from their pre-written guidebooks.

What tomorrow's travellers need more than ever is trusted guidance from experts that's relevant to their individual situation. For some time, publishers have been finding inventive ways to diversify their revenue streams and monetise their expertise, and we'll see even more of this over the coming months and years.



DEEP DIVE: THE FUTURE OF TRAVEL PUBLISHING



This includes going beyond offering blanket advice in printed form, to providing more curated content and in-trip support. In 2018, Rough Guides launched its Bespoke Trip Booking Service, where its local experts plan tailor-made trips for people looking to avoid "soulless, predictable attractions".

And earlier this year, Lonely Planet partnered with international tour operator Intrepid Travel to launch Lonely Planet Experiences – 300 expert-designed, small group tours of destinations, all of

which are carbon-neutral, currently bookable from October 2020 onwards. The collaboration will see Intrepid Travel help Lonely Planet branch out its offering, and provide on-the-ground guidance and personal recommendations from local experts as and when travellers need it.

While travel magazines and travel sections in newspapers normally have the ability to be more agile and reactive with their content than guidebooks, during lockdown, printing and selling them has been a logistical nightmare.

Those that are more reliant on advertising to generate income are hurting right now – there have been reports of advertising rates dropping by as much as 70 per cent – and free publications such as *Metro* and *The Evening Standard* that are printed in large numbers and distributed to commuters have lost their usual readership.

Still, while travellers are at home pining for their next getaway, there's a real opportunity for travel publications to build their audiences by engaging with customers at the inspiration stage of

planning a trip – even if, for many, their power to produce and print physical editions may be limited for now. For this reason, titles with strong, established digital capabilities will ride out the storm more successfully.

Glossy aspirational travel magazines are temporarily adapting the slant of their content in keeping with lockdown living, honing in on where readers are right now – dreaming about the future, making grand plans for #WhenThisIsAllOver, but also looking for immediate ways to make the most of life right now.

Condé Nast Traveller, for example – which in April was offering a year's worth of print and digital subscription for just £12 – is running articles about "finding joy at home" and has an "Armchair Travel" section, which includes articles on how

to experience countries and cultures through books, films, music and food. The travel sections of newspapers, meanwhile, are publishing aspirational features for those looking ahead, such as *The Sunday Times Travel* section's recent round-up of ten essential trips to book for 2021.

Ink Global, which publishes more than 30 in-flight magazines internationally, may not be printing hard copies for a while, but it is actively looking for opportunities to support airlines.

"We're doing lots to reach out to our clients if they need support, if they need any copy updated, or video," said the company's CEO Simon Leslie, speaking on the *It's a Saleslife* podcast. "We're saying to them: 'Now is the time to think about what editorial you need.'"

Given that it's easier and cheaper to produce and

distribute digital content in lockdown conditions – digital magazines, video and podcasts – it's this kind of media that will surely take over from print now. Especially as most airlines have banned paper magazines because they harbour germs.

The future of travel publishing is buoyed by a powerful force – people's desire to see the world. For the time being, the focus of publishers is to maintain strong relationships with their stakeholders, and keep their audiences feeling engaged and inspired, leading them through their travel dreaming stage, building their trust and preparing helpful, accurate, intuitive content ready to be unleashed as soon as they get the green light to confidently book their next trip.

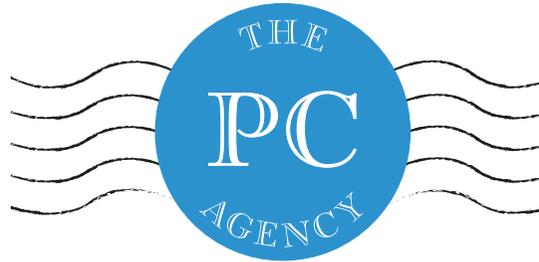
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