

EXECUTIVE SUMMARY



The post-pandemic travel landscape has transformed the global travel industry, introducing new trends and behaviors, especially among Millennials and Gen-Z. As the world adapts to a new normal, these demographics are shaping the future of travel with their unique preferences and demands. This report explores the most significant post-pandemic travel trends, highlighting the rise of experience seekers, the blend of business and leisure travel ("bleisure"), the increase in sustainable tourism, and the power of personalization.

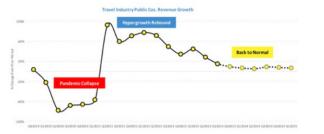
By understanding these trends and their consumers (tribes), travel brands can better satisfy the evolving needs of Millennials and Gen-Z travelers. At the forefront of these trends, they are driving innovation and transformation within the travel industry. Travel brands that adapt to these evolving preferences and deliver meaningful, personalized experiences will thrive in this dynamic market.

What you will learn from this report

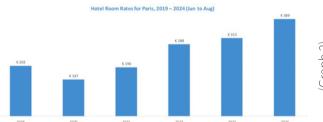
- What is the current state of the tourism industry
- How brands are changing their approaches based on the tribe the brand is aimed to
- What are the leading trends in the tourism industry

A NEW ERA FOR THE TOURISM **INDUSTRY**

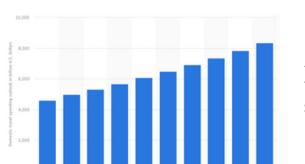
In the wake of the COVID-19 pandemic, worldwide countries implemented travel restrictions on domestic and international flights to contain the spread of the virus and health concerns, causing a significant decline in travel in early 2020. The pandemic has sparked some prominent shifts in the tourism industry. Looking ahead, we can expect steady single-digit growth rates in 2024 and beyond, as indicated in Graph 1.; which is a positive sign that the industry is stabilizing after the turbulent times of COVID. Additionally (Skift, 2024), with the 2024 Summer Olympic Games on the horizon in Paris, there has been a surge in sports tourism. Hotels in the city are reaping the benefits, with room rates showing a whopping 24% year-onyear increase. These exciting developments underscore the pressing need for change in the tourism sector, giving rise to new trends that promise to shape the future of travel, as exhibited in Graph 2 (Skift, 2024).



The surge in domestic tourism is revitalizing local economies, tourism spending projected to reach \$8,350 billion by 2029, shown in graph 3. Understanding how these changes affect Millennial and Gen-Z travelers is crucial as they redefine post-pandemic travel.



Understanding the key trends like the rise of experience seekers, the fusion of business and leisure travel, the surge in sustainable tourism, and the power of personalization, to fully understand how these trends are reshaping the sector, it's crucial to comprehend the target audiences. This understanding will enable travel brands to adapt and thrive in this rapidly changing environment.



DIVERSIFYING OFFERINGS: EXPANDING TOURISM BRANDS WITH NICHE EXPERIENCES.

THE GREEN ADVANTAGE

Rework your partnerships with certifications to boost Your Brand

Partner with recognized sustainable certification programs like Green Key and Green Globe. These certifications can serve as a strong selling point for eco-conscious travelers.

Create unique experiences

Develop packages that include ecofriendly activities, such as guided nature walks, wildlife conservation tours, and organic farm visits. These packages can attract guests looking for sustainable travel experiences.

The Path to Green Adopt Carbon Capture Technology

Invest in technologies like Clean02's carbon capture devices to reduce your hotel's carbon footprint. Highlight these efforts in your marketing materials to attract eco-conscious guests.

Creating a community promotes local and Sustainable Products

Source local and sustainable products for your hotel's amenities, such as toiletries, food, and beverages. This supports local communities and reduces the environmental impact of transportation

INTEGRATING ADVENTURE

Promote Wellness and Adventure

Combine adventure activities with wellness retreats, similar to the Kamalaya wellness retreat, to attract health-conscious travelers looking for a holistic experience.

Offer Exclusive Experiences

Partner with local experts to offer unique and exclusive adventure activities, such as guided tours of hidden gems, private diving sessions, or bespoke desert adventures.

Leverage Technology

Develop an app or integrate with existing platforms like OfftheGrid to allow guests to connect with likeminded travelers, share their experiences, and discover new activities.

Build a Community

Foster a sense of community among your guests by organizing group activities, social events, and themed nights that encourage interaction and connection.

DIVERSIFYING OFFERINGS: EXPANDING TOURISM BRANDS WITH NICHE EXPERIENCES.

CREATING UNIQUE CUSTOMER JOURNEY

Leverage AI for Personalized Itineraries

Implement AI-driven tools to create personalized travel itineraries for your guests. These tools can suggest activities, dining options, and attractions based on guests' preferences and past travel data.

Provide Unique Entertainment Options

Partner with local artists and performers to offer personalized entertainment experiences, such as private theater performances, live music sessions, and art workshops. This can attract guests looking for exclusive and memorable experiences

Create Bespoke Tours

Use generative AI to offer personalized tours based on guests' interests, such as historical tours, culinary experiences, and adventure activities. Ensure these tours are checked and refined by knowledgeable staff to maintain high quality.

Develop Passion-Based Packages

Create packages that cater to specific passions, such as photography tours, cooking classes, and wine tasting events. These packages can attract guests with niche interests and increase revenue through specialized offerings.

Engage with Guests Pre-Arrival

Use pre-arrival surveys to gather information about guests' preferences and interests. Use this data to tailor their stay, offering personalized recommendations and services that align with their passions.

Are you ready to divide into the world of creating powerful strategies like this?

Embark on a journey to a world where innovation thrives! Welcome to Antropomedia Express, the dwelling of four unique chatbots. One guides you through any statistics you seek, another reveals captivating case studies, a third leads focus groups to understand mysterious tribes, and our standout chatbot constructs compelling arguments for any idea you have. No matter how complex or uncommon your vision, our chatbots spin engaging stories filled with wisdom.

Contact us to learn more!





1. EXPERIENCE SEEKERS



Adventure tourism

Over the last few years, the popularity of experiential travel has increased significantly. After a pause in travel during the COVID-19 pandemic, people are now. The most popular consumer motivations for traveling were new experiences, to go off the beaten track, and to travel like a local; top trending activities are hiking/trekking/walking, culinary/gastronomy, cultural, safaris/wildlife viewing, electric-bike cycling, and wildlife/nature photography.

(<u>Adventure Travel Trade Association</u>,2024)



The demographic

Nearly half of travelers will prioritize exploration and adventure, with Gen Z and Millennials (52% for both) carving out more budget for these types of experiences than other generations.

(<u>Hilton</u>, 2024)



Culinary experience

As they budget for 2024, across generations, approximately half of travelers' top focus is on culinary experiences. And when travelers start searching for reservations, there is widespread interest in eating local and regional cuisine (86%) and having a good restaurant within their hotel (82%).

(<u>Hilton</u>, 2024)



Tribe:Wanderlusters

Description of their identity

This tribe brings together a group of profiles between 20 and 35 years old who define themselves in their digital social media as Wanderlusters, travelers who enjoy the journey more than the destination. They boast of being able to wander, to have no fixed course, and to find in that transit the things to which they give value.

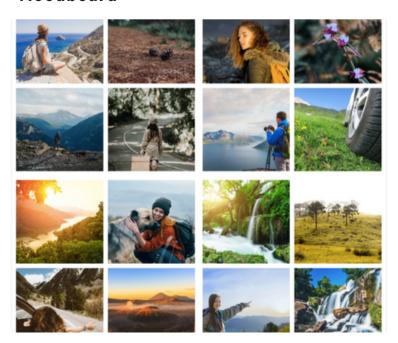
Digital media content

Includes photographs of the different spaces and scenarios they travel through. They show such places as fascinating, even if they are not famous, recognized or too critical. Their narrative describes a way of life mobilized by ease and spontaneity.

Gender

67% Women, 33% Men

Moodboard



Brands who they follow/interact with



















Kind of stories consumed by the tribe

This tribe connects with brands that focus on the details of the different accommodations: the more nooks, crannies, and curiosities, the better for Wanderlusters.

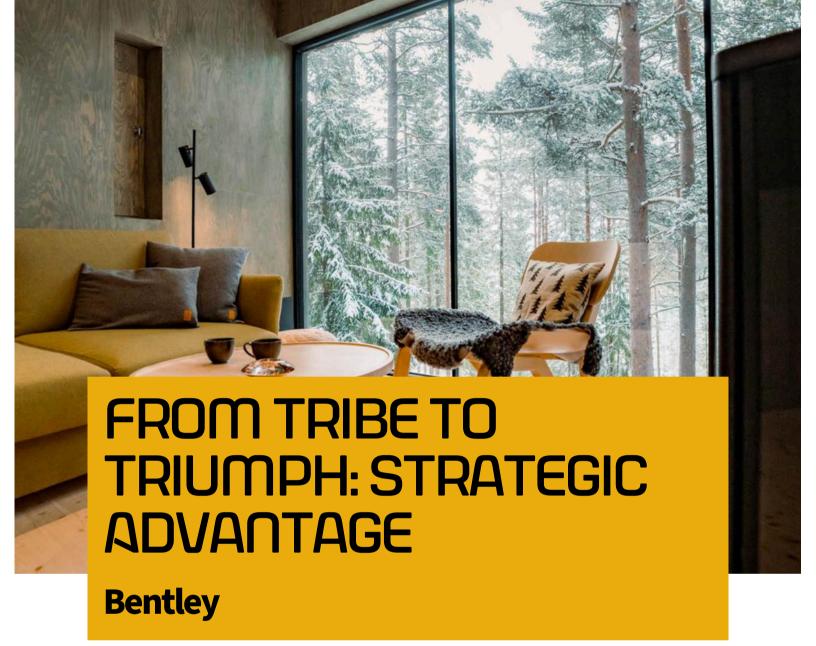
Also, they follow narratives with "adventurer" and "explorer" characters demonstrating freedom and autonomy in their persona.

Google Ads Keywords

"travel blog," "travel tips," "top world destinations," "explore travel," "landscapes."

What hurts or causes them conflict

Sedentary lifestyles are what cause this tribe conflict. For this tribe, staying active and moving from destination to destination is essential. If they are inactive, they are not fulfilling their role as explorers to others.



Innovation: <u>Bentley's Scandinavian travel experience offers awe on</u> <u>wheels</u>

Business Objective: Improve customer experience

Over the course of 2023, the UK-based automotive brand Bentley whisked consumers off to beautiful destinations - introducing them to 'Extraordinary' nature, architecture and design. The first of its Extraordinary Journeys road trips ran through August and September; coursing through Scandinavia's woodlands, stopping off for Michelin-star meals in pine forests and guided tours of the region's most impressive design feats. Two further trips are planned for August and September 2024, taking in remote parts of England and Scotland from behind the wheels of Bentley's iconic, luxury vehicles.

Tribe:Culinary Explorers

Description of their identity

Culinary Explorers are self-taught foodies who combine a love for food with travel. They prioritize experiencing local flavors and avoiding tourist spots, valuing authenticity over chain restaurants.

Culinary Explorers blend luxury with gastronomy, seeking new food experiences globally while maintaining high standards in travel, hotels, and clothing. Their pursuit of luxury revolves around exceptional dining experiences.

Foodie bloggers on social media platforms like Instagram, TikTok, and Youtube focus on exploring global cuisine with visually appealing content emphasizing aesthetics, color, perspective, and arrangement in their posts.

Gender

44% Women; 56% Men

Moodboard



Brands who they follow/interact with



Kind of stories consumed by the

Culinary Explorers value brands that manage to import world-class standards to the cultural context in which they are. In this sense, they prefer the foreign to the nation due to their exploratory nature towards the different. The stories they consume, therefore, portray luxury not from the flashy but from personal sensation, taste and exclusive exploration.

Google Ads Keywords

"food spots" "new restaurants"

"restaurants near me" "food bloggers"

"food reviews" "luxury restaurants near

me"

What hurts or causes them conflict

The Culinary Explorers seek authenticity in a globalized world by uncovering unique stories and experiences exclusive to specific places.



Alchemist & SpaceVIP

Innovation: Michelin-starred chef to compose dining experience in space.

Business Objective: Improve customer experience

The Michelin-starred Alchemist restaurant in Copenhagen will be providing the catering onboard SpaceVIP's Space Perspective luxury balloon capsules. Drawing upon 'the overview effect' - a feeling of common humanity experienced by space travelers - head chef Rasmus Munk will create a menu that highlights food as the

common thread in human existence. In line with Munk's philosophy of 'holistic dining', the meal will complement the balloon's interiors and passengers will be dressed in bespoke outfits by French luxury brand, Ogier. A single six-hour journey in the pressurized space capsule is expected to cost USD 495,000, with the first group of six travelers taking off from the Space Coast of Florida in 2025.

2 BLENDED TRAVEL AND LEISURE

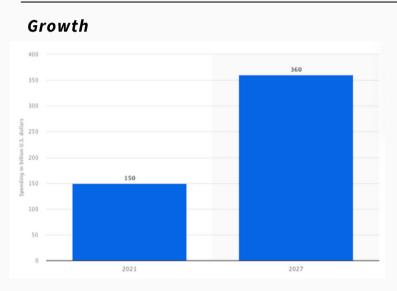


"Bleisure"

The rise of blended travel, where business and leisure are combined, as well as the growth of "bleisure" travel among younger professionals, are shaping tourism trends. The return of business travel is more complex as employees embrace blended travel for a stronger work/life balance.

(<u>Statista</u>, 2024)

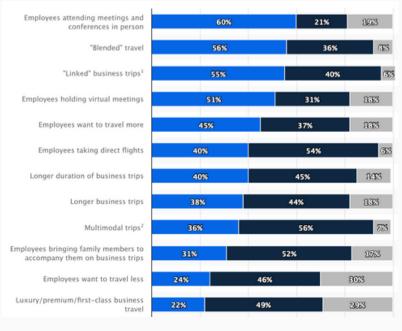




Bleisure travel spending, which involves trips combining business with leisure components, was expected to increase by 140 percent between 2021 and 2027. In the forecast year, the expenditure of travelers taking blended trips – another term to refer to such trips – was expected to reach around 360 billion U.S. dollars (Show In the graph)

(<u>Statista</u>, 2024)





A new type of travel

the technological advancement of our time and the coronavirus (COVID-19) pandemic have made this form of work more accessible to other employed or self-employed persons. According to a survey conducted in October 2023, nearly half of travel professionals reported seeing a recent increase in the interest of employees in taking bleisure trips, while only seven percent affirmed the opposite.

(Statista, 2024)

Tribe: Explorers

Description of their identity

The tribe "Explorers" is formed by people between 20 and 40 years old who articulate their identity from the collection of experiences, whether they are from the city or not. They are receptive, open-minded and in a recurrent search for new learning and horizons, to the extent that they constantly travel to natural places (forests, jungles, camps) and non-natural places (cities, towns, etc.). It is always about seeking novelty through travel and the multiple constructions of new human relationships.

The nomad constructs their identity through constant movement, seeking new experiences like visiting magical towns, camping, and trying regional foods. Speed and immediate change interest them most, regardless of the context being natural or urban.

Gender

25% Women / 75% Men

Moodboard



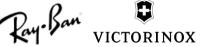
Brands who they follow/interact

HUFFPOST













Kind of stories consumed by the

For this reason, if a brand intends to address this tribe, it must enhance the present through its products and services. Any narrative aimed at Explorers must show how the product or service (a room, a restaurant, among others) is a new experience that will last over time.

Google Ads Keywords

"Explorers", "exploring life", "adventure travel", "nature tours", "natural experience", "nature",

What hurts or causes them conflict

The nomadic lifestyle causes discomfort as individuals struggle to enjoy the present moment while constantly seeking new experiences. This tension between living in the present and anticipating the future leads to anguish over the fleeting nature of current experiences.



Innovation: <u>Digital nomads rejuvenate rural village by sharing skills</u> for free accommodation

Business Objective: Improve resilience

In an effort to rejuvenate its economy, the remote Sardinian village of Ollolai is inviting remote workers to stay for as little as EUR 1. In exchange, they're expected to share their skills and knowledge with the local community. Ollolai is being highly selective. It will host one visitor at a time for three month stints, with bills, rent and utilities covered by EUR 20,000 of investment. The first successful applicant was a software developer from Los Angeles, with the second professional visiting from Singapore. Applications opened in September 2023 with the first nomad arriving in November.

3. SUSTAINABLE



Growing climate consciousness of travelers

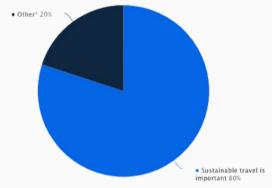
Over the last few years, the popularity of experiential travel has increased significantly. After a pause in travel during the COVID-19 pandemic, people are now, more than ever, seeking unique experiences where they can fully immerse themselves in the culture of the area they're visiting. No matter the type of trip or time of year, consumers are searching for these one-of-a-kind travel opportunities.

(Bremner, 2023)



Travelers are prioritizing sustainable practices

Many travelers are prioritizing sustainable practices with a growing awareness of climate change. People are becoming more environmentally conscious. According to the source, as of February 2023, 80 percent of travelers worldwide believe that sustainable travel is important.



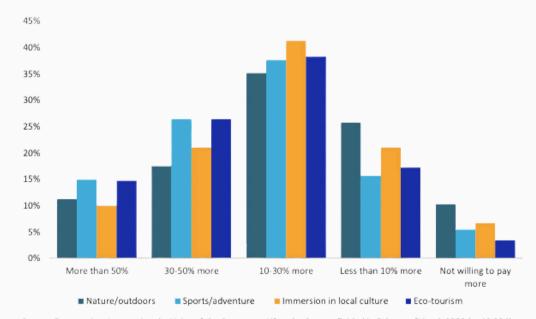
(Statista, 2023)



Will consumers pay for sustainable travel features and experiences?

With sustainability often mistakenly deemed as more expensive 79% said that they were willing to spend at least 10% more for eco-tourism and adventure travel in 2023; shown in the graph bellow.

(Euromonitor, 2023)



Tribe: High Frequency

Description of their identity

This tribe comprises a network of profiles from 18 to 35 that position themselves in social media from a postmodern luxury: focusing more on hedonistic and aesthetic experiences and placing the individual in contact with nature and the search for harmony. In this sense, travel becomes not only an aesthetic element that can appear in their user profiles but also a discourse that makes it possible to give a connotation to their lifestyle from the ecological, the spiritual, and the mystical.

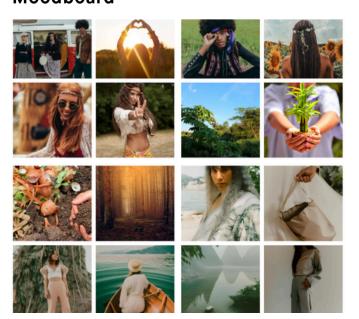
Google Ads Keywords

"ecological brands," "nature-friendly products," "organic products," "luxury ecological brands," "local brands consumption," and "consume local."

Gender

78% Women, 32% Men

Moodboard



Brands who they follow/interact with



Kind of stories consumed by the

This tribe follows brands and narratives that show those natural spaces in their destinations. In addition, they seek more boutique or exclusive experiences for people who promote the same kind of identity.

What hurts or causes them conflict

Anxiety and stress are what concern this tribe. Their "vibrations" need to be high, so they mainly focus on experiences that permit them to experiment with a heightened state of mind through travel, nature, food, and music. In addition, they are conflicted by people who are not in the same tune and are mainly negative because they feel that it will take away their "peace."



Fiji & Coral Gardeners

Innovation: Couples invited to adopt baby coral for Valentine's Day

Business Objective: Boost sales

For Valentine's Day in 2024, Tourism Fiji and the NGO Coral Gardeners partnered to launch the Coral Bouquet. A traditional flower bouquet comes with high levels of carbon emission, associated mostly with the transport. Instead of gifting flowers, couples were invited to adopt baby corals, which will be cultivated and planted in their name. Gifters could purchase a Coral Bouquet for USD 25, add a personal message and receive a downloadable card to send to their loved ones. All proceeds from the initiative supported coral restoration work in Fiji.

Tribe: Wildlife Watchers

Description of their identity

A tribe of individuals aged 20 to 50 on social media who showcase their love for nature and wildlife, sharing about ecosystems, pets, natural spaces, and advocating for animal rights and ecosystem preservation.

Belonging to the tribe doesn't require specialization in species care; respect for all living beings is key. Many tribe members are vegans or vegetarians due to their values.

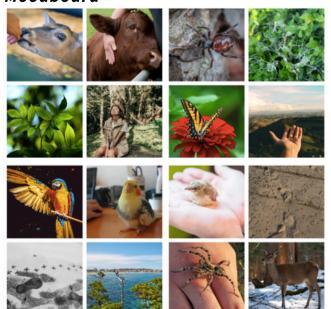
Google Ads Keywords

"protect wildlife species," "protect nature," "fight for the environment," "wildlife species," "protect species," "protect animals."

Gender

34% Women, 66% Men.

Moodboard



Brands who they follow/interact with

moderndog KOHL'S GREENPEACE

TIFFANY & Co.







Kind of stories consumed by the tribe

The tribe follows stories representing spaces that allow them to approach nature in a way they can enjoy and respect.

Speaking about brands and products, they consume organic, recycled products, which does not cause a more lousy impact on the planet.

What hurts or causes them conflict

What frustrates the tribe is the anti-nature discourse and toxic practices against the environment. They not only seek to demonstrate that they are lovers of nature and the different species but also seek to emphasize the constant struggle of specialists and nature lovers in the face of environmental injustices on the planet.



Innovation: Rental platform maps out nature trails encouraging walk-and-talks with loved ones

Business Objective: Build brand community

10 encourage everyone to put down their phones and reconnect with their loved ones, Natuurhuisje — a nature-focused Dutch vacation rental platform — has marked hiking trails in forests surrounding the village of Lage Vuursche in the Netherlands. These Praatpaadjes, or 'talking trails,' were unveiled in Q1 2024 and feature markers along the way with conversation prompts like "If you could step into a time machine, where would you go?" and "Which qualities do you admire in one another?". Three separate trails are available through 21 June 2024: a 10 km trail for walks with friends, a 6 km trail for families, and a 5 km trail for romantic partners.

4. PERSONALISATION



Niche tourism

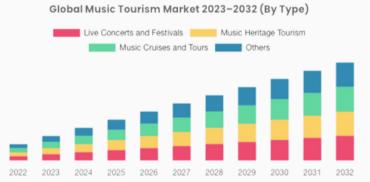
Niche tourism segments such as wellness, luxury, eco-tourism, sports and adventure are expected to be major growth areas in the year ahead, as consumers increasingly prioritise personalized experiences aligned with their lifestyles and values, driving a willingness to pay more for what matters most to them.

(<u>Bremner</u>, 2024)



Concert Tourism

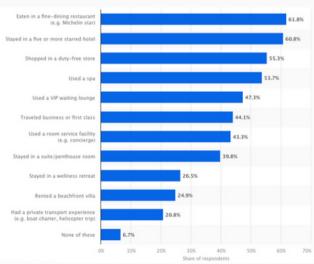
Music tourism, blending the love for music with travel, offers immersive and unforgettable experiences, attracting a diverse audience seeking to connect with the global music landscape. the global Music Tourism Market is expected to record a CAGR of 8.5% from 2023 to 2032. In 2023, the market size is projected to reach a valuation of USD 6.6 Billion. By 2032, the valuation is anticipated to reach USD 13.8 Billion.



(<u>Custom Market Insights,</u> 2024)



Luxury Tourism



Luxury hospitality, one of the most valuable global luxury markets, is a pillar of high-end travel and tourism, turning from a niche segment into a cornerstone of the lodging industry. From 1983 to 2023, the global luxury hotel supply – measured as the number of available rooms – nearly tripled, peaking at more than 1.5 million in 2023.

eating in a fine-dining restaurant while on vacation and staying in a five or more starred hotel were the most common holiday activities

Tribe: Concert Freaks

Description of their identity

Concert Freaks is a community of live music fans who go beyond listening to music by attending festivals and concerts globally to showcase their fanaticism.

This is how the tribe configures its identity from the figure of the melodic nomad. This means that to belong to the tribe. Members must listen to music regularly and attend festivals, concerts, and live sessions of their favorite artists, which causes them to constantly travel in their country and, in some cases, abroad.

Google Ads Keywords

"live concerts", "music festivals",

"electronic music", "acetate records",

"Bluetooth speaker".

Gender

35% Women; 65% Men

Moodboard



Brands who they follow/interact with



ticketmaster





COACHELLA





Kind of stories consumed by the

Exploration as the guiding axis of communication is the main element that makes this tribe pay attention to a story or commercial. This is a tribe that relates to contents that show a free lifestyle, that is, oriented to search for musical experiences beyond territorial borders to consolidate their fanaticism at any cost.

What hurts or causes them conflict

The tribe produces tension among all its members: continuously seeking and consuming musical experiences. Hence, the tribal environment is established from the constant comparison to show who is the most fanatic or the most frantic member in the passion for consuming live music.





Government of South Korea

Innovation: South Korean government teases new K-Culture visa

Business Objective: Build brand community

In January 2024, South Korea announced plans to launch a K-Culture visa that would target international Korea-philes. To qualify, visitors will need to partake in education or training programs within the country's thriving entertainment sector - contributing to its output of globally recognized films, drama and music. The visa will likely be rolled out in conjunction with a series of K-Culture events the government plans on hosting in 2024. It will complement South Korea's reformed Digital Nomad visa which, from January 2024 onwards. allows people with earnings of over KRW 89.46 million (roughly USD 66,000) to stay for a year - with the option to extend their stay a further year.

5. PANDEMIC TRAVELLER



Loyalty programs

Millennials are active in loyalty programs, especially airline loyalty programs. Airlines should customize marketing to attract Gen Z by highlighting relevant benefits and adapting programs for both generations.

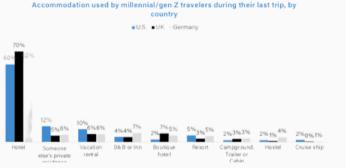
Hotel loyalty program participation shows less generational gap compared to airline loyalty programs, indicating consistent engagement across generations in hotels.

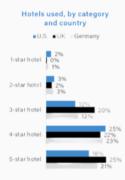
(Skift, 2024)



Accommodation preferences

Reveal a nuanced landscape, with both generations favoring hotels but showcasing differing attitudes towards budget- friendly options and luxury experiences. Customer service and standardized offerings remain paramount in accommodation choices, highlighting the importance of reliability for these discerning travel.



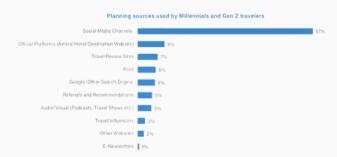


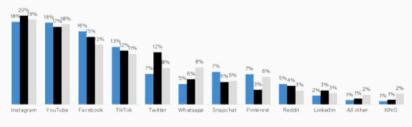
(Skift, 2024)



Social media shaping travel decisions

Social media, particularly Instagram and YouTube, emerges as a pivotal force in shaping travel decisions, signifying a pronounced shift towards online mediums in travel planning among younger generations. While both demographics favor free independent travel, distinctions in platform preferences, such as TikTok and Snapchat for Gen Z, highlight evolving trends in digital engagement.





ABOUT ANTROPOMEDIA

About this report

This report is a compilation of the profound research you can find in Antropomedia Express; our professional research platform offers deep insights into your customers, featuring fascinating reports on consumer tribes, captivating case studies, and compelling statistics.

ANTROPOMEDIA

Our revolutionary research approach stands on three intertwined pillars to empower transnational conglomerates and regional firms, granting them a competitive edge in overcoming customer-centric challenges and dominating their markets.

Antropomedia is leading in Al research innovations.

Our research platform represents the most comprehensive digital tribe encyclopedia in the world. In it, you will find descriptive sheets, and with our trained AI assistants, your information needs are at your fingertips.

Whether you seek rapid responses to queries or aspire to create a marketing pitch infused with data and creativity, we provide the means.

ABOUT US

With offices in Mexico and Switzerland, Antropomedia focuses on audience analysis by applying anthropology and other digital methods to study the construction of consumer tribes and collective identities in social networks. To achieve this, we adapted the symbolic interactionism theory and pioneered using 3D sociograms, NLP, and AI to represent relationships between followers, interacting users, and content in social media.



Our research unit based on digital anthropology® not only explores the connections that arise within digital communities, but delves into the heart of the interactions that arise from the people who participate there.

Personalized strategies solutions

We develop strategies that resonate deeply, based on a detailed understanding of collective and semantic affinities, ensuring that each message strengthens the connection with your brand.

Unlock a world of possibilities. Contact us now!

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