Immersive Travel

Experiential and efficient service platforms are changing how we plan trips, transit, stay at and experience destinations.

BRICKFIELDS™

Introduction

Immersive Travel

More people are travelling today than ever before. According to the International Air Transport Association, the average roundtrip airfare in 2017 was USD$351 – 63 per cent lower than airfares in 1995. For leisure seekers, this reduced cost of air travel has been gradually lowering the barrier to entry. For global industries, technology is enabling employees to become increasingly mobile, no longer tied to one location. This sustained growth of air and rail travel has spurred a shake-up of the wider travel industry to meet the demands of growing numbers of travellers who are diverse in their demographics, budgets and experiential preferences.

In this report we look at the whole travel journey – planning, transit, experience and accommodation – with a particular focus on the immersive. Here, immersive is both the experiential and compelling elements of a trip, 0 4 ")) 0 # 2 + 1 & , +) 0 - " 1 0 › , / ! " ! allow travellers to seamlessly integrate into their new context. The champions behind immersive travel are a progressive set of niche operators, tech start-ups, data specialists, local governments and impact-driven individuals.

On a macro level, the benefits of immersive travel are the creation of personal connections that can build empathy and respect for local lifestyles. On a city level, it can also lead to inclusive and creative solutions for over-tourism, ensuring places are enjoyed sustainably.

Introduction

Immersive Travel

Our key takeaways:

- Apps that aggregate geolocation data, booking sites and online &1&+"/ /&"0 /" ,›"/&+$ 1%" 21*,01 &+ -) + travellers.
- Peer-to-peer platforms are allowing locals to generate an income by providing authentic insight for prospective travellers.
- Platforms providing kits-of-parts or on-demand accommodation in remote locations present a win–win to hosts and travellers, injecting money into local economies and removing the barrier to entry respectively.
- Wayfinding apps utilising beacons are enabling fast transit for travellers, whilst capturing geolocation data to optimise operations for asset owners.
- -"/ 1,/0 ,›"/&+$ 0, &) &*- 1 1/ 3") /" " transparent and accountable for their practices, in response to the demand of ethical consumers.
- Property developers are partnering with travel clubs to integrate exclusive amenities into luxury residential product as a means of attracting lifestyle-conscious buyers.
- Cities are investing in behaviour mapping to manage over-tourism. The most creative solutions are inclusive, integrated with transport, -&1)&0" ,+ ,› -" (-"/&,!0 +! ")" / 1" +"4

Ch. 1/4

Planning

Quick reference
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p.5 Self-guided
p.6 Bespoke
p.7 Mystery

Digital platforms and niche curators are redefining how we plan our travel, both luxury and budget options.

The way we plan our travel has changed. While traditional travel agents are still consulted, travellers are more informed and autonomous than ever – whether of their own accord or via a new cohort of niche travel consultants.

To look at this in terms of extreme users, at one end of the spectrum we are seeing the rise of the DIY traveller, who seamlessly glides between online forums, Airbnb, Instagram, local lifestyle guides, and Skyscanner to nab the
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other end of the spectrum, planning a trip can be
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this group, a new breed of travel consultants has emerged,
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bespoke, with every detail taken care of.

The key drivers that underpin both these groups, and travellers generally, is the growing desire for highly authentic travel experiences – regardless of one's travel style or budget. Maturing consumer trends in the personalisation of products is also fuelling this desire to
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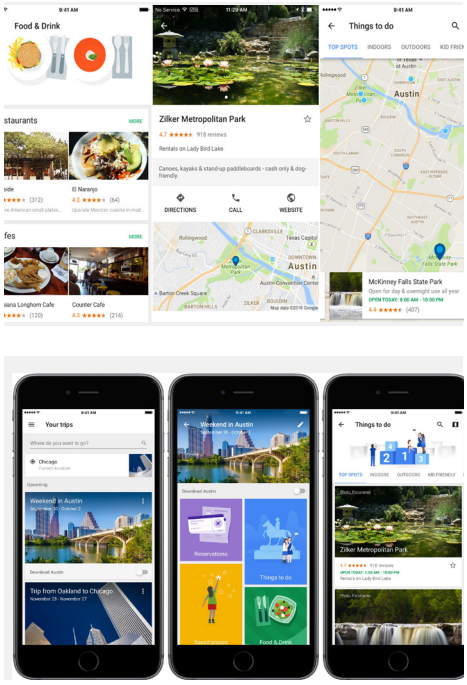

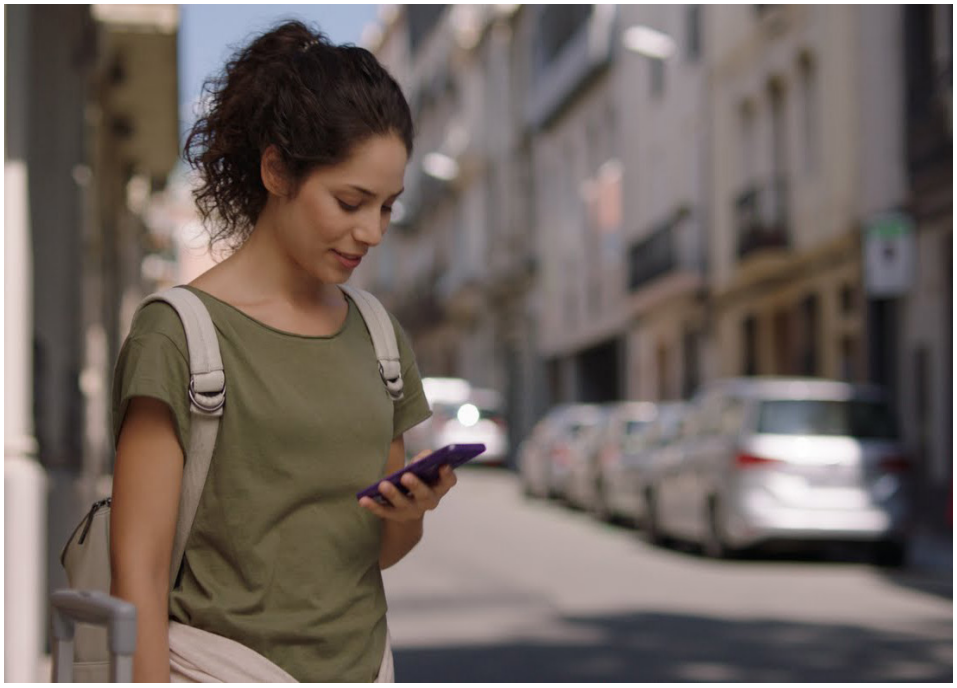

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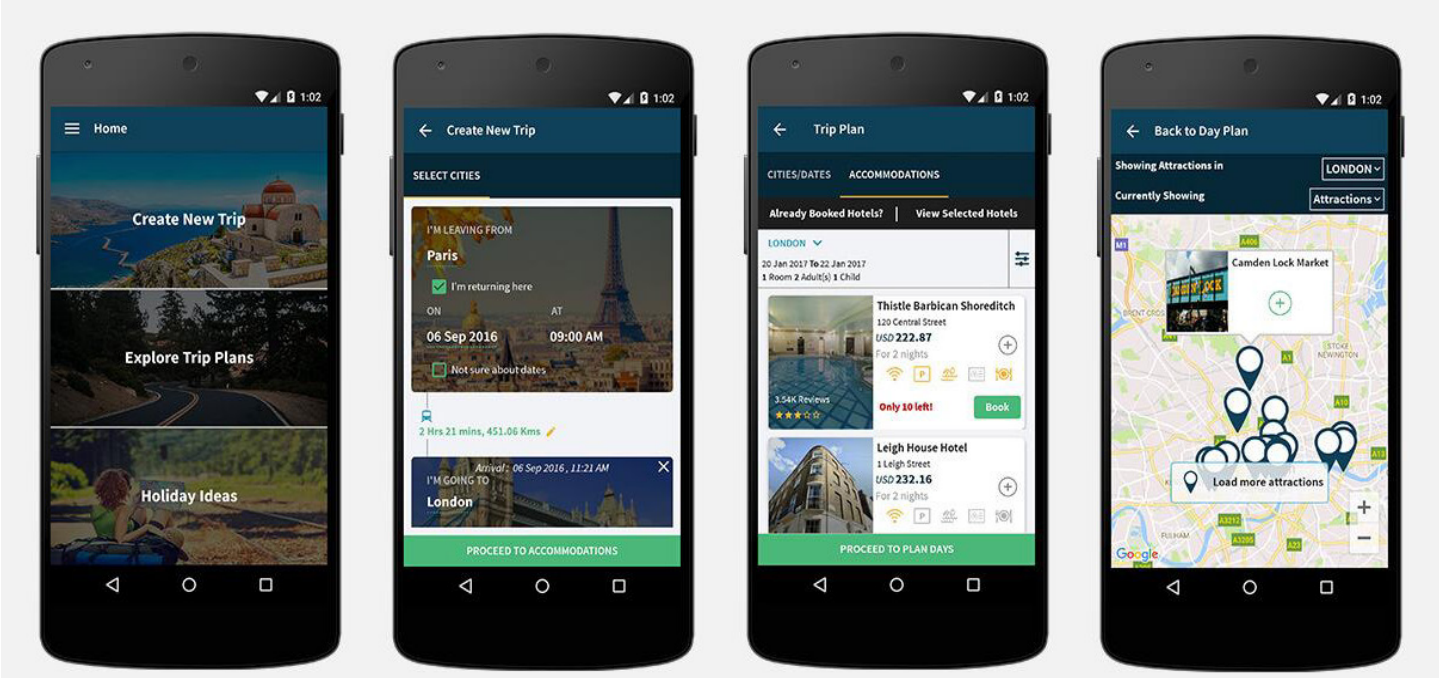
Google Trips app

Self-guided

The mass access to information, data aggregation and online inspiration has brought about a cohort of highly independent travellers who can create their own journey end to end without the need of an agent. To support this cohort, a set of applications have emerged to streamline the trip planning process.

One in particular is Google Trips, which serves as a repository for all the logistical aspects of a trip. It aggregates information such as flight dates, car bookings and hotel reservations from other Google accounts (such as Gmail) into a central app. All of the information + " 0 3 "! # , / , ›) & + " 3 & " 4 & + $ þ & + 0 " 1 / 3 poor mobile coverage. Whilst on the go, travellers can also use the app to generate a daily itinerary of sightseeing or discover attractions within their immediate vicinity (made possible by Google Maps and the search engine itself). Still in its early stages, the itinerary planner works best for the big-name attractions but is less savvy for revealing small-scale, lesser known spaces.



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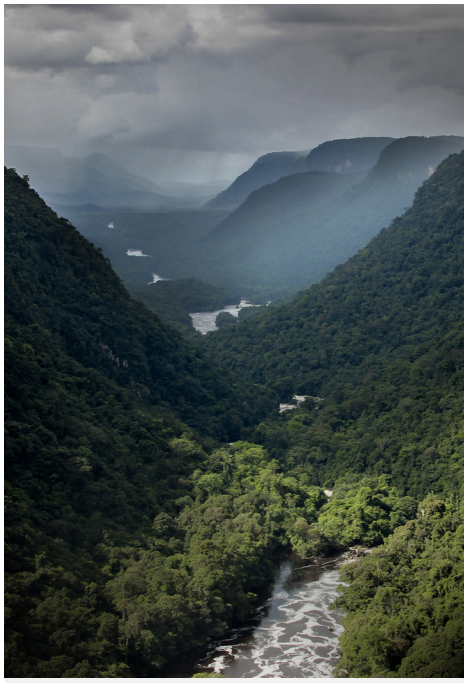
Tribhobo app

For tried and tested itineraries, Triphobis an app that allows travellers to view the journeys taken by others as inspiration. Rather than starting from scratch, the interface lets travellers customise and ‘work on top of’ existing itineraries, and also allows the booking of hotels, flights and city connections within the app. Triphobo represents the generosity of the sharing economy and the power of aggregating aligned travel industry players for convenient trip planning.

Bespoke

The ability to personalise products and delivery times around one’s own lifestyle and preferences has long been an expected norm among consumers. Now, a new breed of travel agents and tour operators are emerging which stand to deliver the utmost in bespoke, tailor-made travel experiences.

Operating at the premium end of the market and appealing to high net worth individuals is Black Tomato. The company specialises in creating tailored travel experiences – be it for a family trip, wedding or solo adventure – that are beyond what would be found in a blog. According to founder Tom Marchant, a significant investment is made in R and D to capture ideas outside the travel industry, " + 0 2 / & + $ 1 % " * , 0 1 2 + & . 2 " " 5 - " / & " + " 0 / " / just for the time poor, but for those who want to be guided through the creative process and be presented with the unimaginable.



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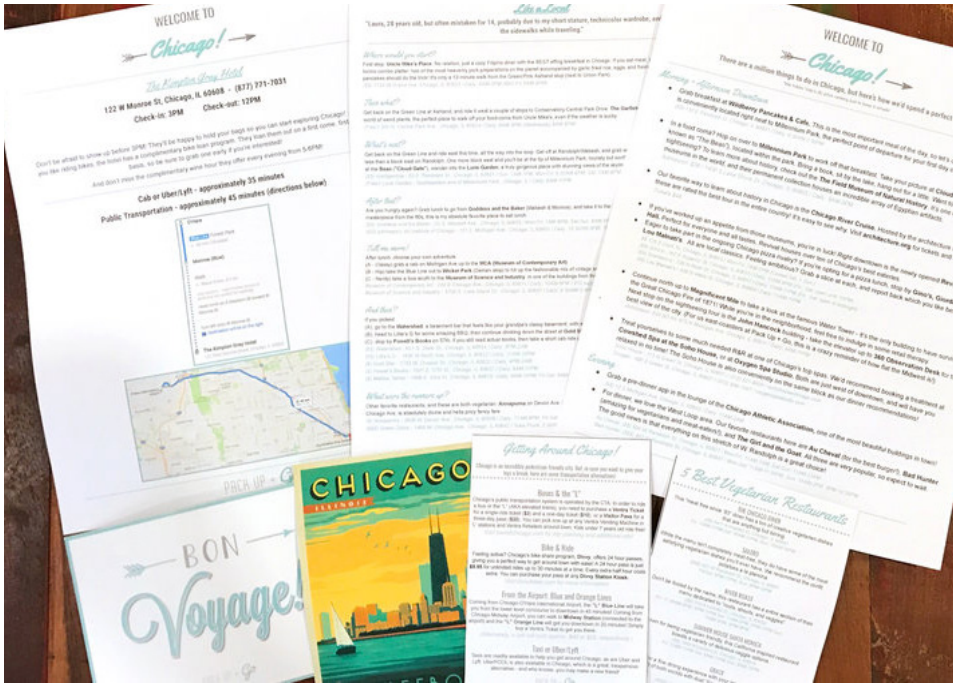
Black Tomato,
New York, U.S.A

Black Tomato leverages the experience economy, taking heed that 50 per cent of their customers don't know where they want to travel, but they know how they want to feel. For Marchant, the future of travel will be about transformative experiences, as travellers are seeking deeper encounters with a lasting impact in response to the fast-paced, instant-gratification society in which we live.

Mystery

For the adventurous traveller, new companies are emerging with the
& * , # , › " / & + $ 2 0 1 , * " / 0 0 2 / - / & 0 " ! " 0 1 & + 1 & ,
These opportunities build genuine excitement and anticipation of the unknown – a rarity in today's society where instant access to information has reduced serendipitous encounters.

One such company is US-based Pack up + Go, which plans three-day weekends for its customers, all while keeping the destination a surprise. Travellers are asked to complete a survey noting their budget, dates and experiential preferences, enabling Pack up + Go to book relevant travel and accommodation.



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Pack Up & Go,
U.S.A

Where the company really captivates is the gradual build-up of clues and information, delivered by email and mail a few days before the trip. Customers are told the weather forecast, recommended items 1 , - (" ý $ ý þ % & (& + $, , 1 0 + ! 4 % " / " 1 , $, (e.g., Grand Central Station). On the day of travel, all is revealed via an envelope containing directions, a city guide and a curated list of recommendations for cafes, nightlife, museums and rainy-day activities.

Ch. 2/4

Transit

Quick reference
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p.12 Experiential

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freeing up time for compelling experiences before
you even take flight.

Airports and airlines are pushing the boundaries of the rudimentary transit experience. In a bid to remain competitive, investments in innovation are creating both % & $ %) 6 " › & & " + 1 + ! " 5 - " / & " + 1 &) * ,
Developments in technology are reducing time spent in check-in, immigration and security, allowing for a fast and seamless journey. This appeals to time-poor business travellers and those who want to be free to enjoy the more exciting parts of the travel experience.

On an experiential level, leisure activities that require an extended stay are also being rolled out both to delight travellers and strategically increase their dwell and spend time at the airport. This is coming in the form of novel departure lounges, museums and movie theatres as well as opening the airport up to non-travellers.

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Changi Airport,
Singapore

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expectation among travellers, especially the business set who are
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reported that more than 60 per cent of airline executives and nearly 60 per cent of consumers agree that boarding without human interaction would yield a great improvement in the customer experience.

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study by SITA (Société Internationale de Télécommunications Aéronautiques) estimated that for every additional ten minutes in security, customers spent roughly 30 per cent less in the airport; thus, the optimisation of the transit journey can translate to increased revenue for the airport itself as well as a reduction in labour costs.

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which has deployed a FAST (‘fast and seamless travel’) system into its new terminal T4. With an aim to be frictionless, the terminal relies heavily on facial recognition technology allowing passengers to
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Tomography scanners which allow laptops to remain in bags during security are also said to be deployed. In theory, this automated system allows travellers to complete their transit journey without the need for personal service. According to Reuters, the automated system has cost S$985 million (USD$723.57 million) and will yield a

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Beacon wayfinding,
Gatwick Airport, London U.K

manpower saving of about 20 per cent in the longer term. As a # 2 / 1 % " / & + ! & 1 & , + , # 1 % " & * - 1 , # " › & & " - the size of Changi's third terminal, it will still be able to handle two-thirds the number of its passengers, allowing the airport to increase its overall annual capacity by 66 million passengers.

Smart wayfinding is another touchpoint that can simplify transit and optimise operations. In 2017, Gatwick Airport in London deployed 2000 battery-powered beacons to help its passengers navigate the terminal with ease. Using their smartphones, passengers receive 'blue dot' indoor directions, with the added support of augmented reality (AR) through the use of their phone screen and camera. In an interview with Future Travel Experience (FTE), Abhi Chacko, Head of IT Commercial and Innovation at Gatwick Airport, explained that beacons are more reliable than GPS and can be used easily in tandem with airport and airline apps.

On a macro level, the use of beacons can optimise operations of the whole airport ecosystem. This is made possible by collecting locational data on high-use and low-use zones in the airport, providing information from which to strategise new types of operations or investment. Such principles are translatable and beneficial for other assets in retail, transport and workplaces.

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Departure Beach
by Virgin Holidays,
Barbados

Experiential

Airports and transit touchpoints are becoming more novel and experiential – with the most progressive setting themselves up as destinations in their own right, becoming an integrated part of a 1 / 3 ")) " / 0 " 5 - " / & " + " ý % & 0 & 0 1 / & ( ) " ! , 4 economy and the rise of third spaces, i.e., those spaces between destinations for leisure, rejuvenation or productivity.

A key exemplar is the 'Departure Beach', an airport lounge situated on Brownes Beach in Barbados, planned by Richard Branson's tour company Virgin Holidays. For USD$25 per adult and USD$15 per child, travellers can be collected from their hotel, use private airline check-in and bag drop facilities, and proceed to enjoy the beach, sun) , 2 + $ " 0 + ! , * -) & * " + 1 / 6 2 › " 1 ý) , 0 " / 1 , , / are then transferred to the airport terminal, luggage free and ready to clear security.

Where Virgin Holidays succeeds is not only in the reinvention of departure into an extension of the vacation, but in understanding that departure begins at the hotel. As such, they have taken control of the whole journey to deliver a holistic and memorable experience.

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Pittsburgh Airport,
Pittsburgh, U.S.A

Transit experiences are also about the humble, simple moments with loved ones. In September 2017, Pittsburgh Airport changed its security regulations, allowing non-travellers to meet and farewell loved ones at the boarding gate, as well as enjoy the airport's amenities between the hours of 9 am and 5 pm. The airport had this as a precedent prior to 9/11 and was a favoured place among the local community for a Friday night out. Reinstating this experience, the airport functions almost like a town centre, where visitors can dip into a mini Carnegie Science Center, a kids' zone created by Pittsburgh Children's Museum, browse up to 100 retailers and enjoy more than 30 diverse restaurants, some operated by celebrity chefs.

This concept functions well for the Pittsburgh context, which has a smaller population, a strong local community, and is a 'return to' airport, rather than one for onward connections. It is yet to be seen if this would work well in the larger cities of the US.

Ch. 3/4

Experience

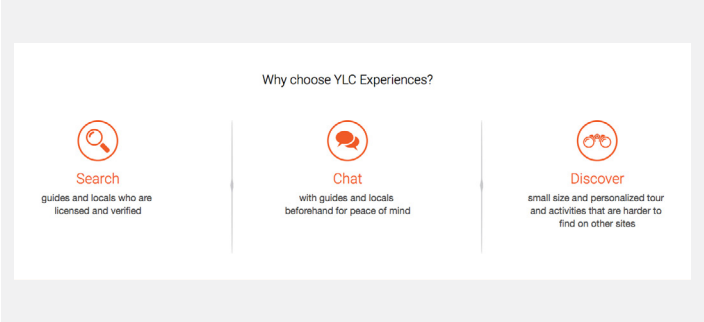
Quick reference
—
p.15 Leisure
p.17 Impact
p.19 Business

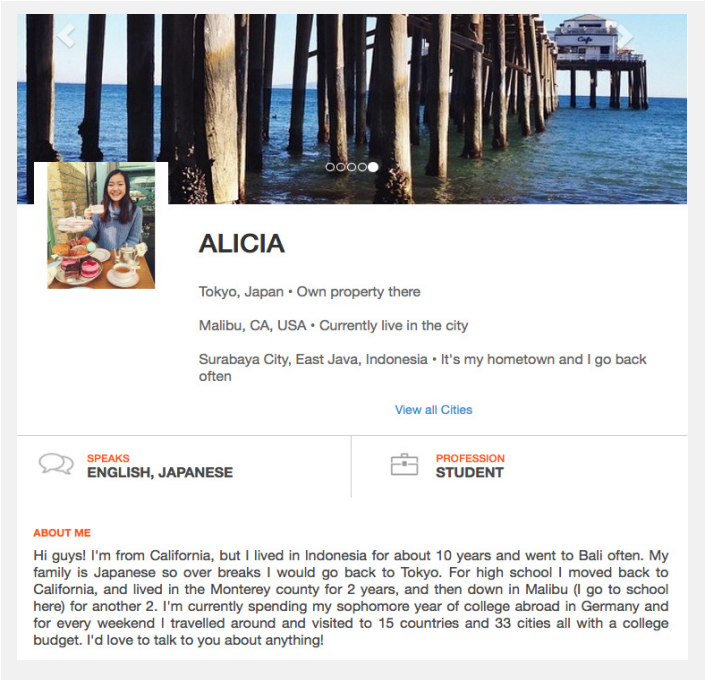
New preferences for localised and impactful travel are being met by innovative partnerships and services.

Experiential preferences and destination activities are changing among those who travel for leisure, business or social impact. For leisure travellers, visiting typical 1 1 / 1 & , + 0 0 2 % 0 1 % " & › ") , 4 " / but this group is eschewing mass travel in search of immersive and personal experiences. This is a preference popularised by Airbnb and a want to connect with - " , -) " , + ! " " - " /) " 3 ") + ! # " ")) & (" / / & 3) þ & + , + 1 / 0 1 1 , 1 % " ! 6 1 , ! 6 by technology.

An extension of this also sees a cohort of conscious consumers whose purpose to travel is centred on activities that have a social or environmental impact. This group already has a preference for brands and products that reflect social responsibility, and travel is the next stretch of this mindset.

For frequent business travellers and digital nomads, the lines between work and leisure are blurring. Preferences that seek to be more integrated in the local culture of a destination, rather than an ‘business outsider’, are dictating choices in where to work and where to stay.





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Your Local Cousin,
New York, U.S.A

Leisure

Local guides

Preferences for highly localised experiences are being met with the emergence of niche businesses that are centred on making personal , + + " 1 & , + 0 þ # / , * $ & 3 & + $! 3 & " 1 , - / , 3 & ! & +

Your Local Cousin & 0 , + " 0 2 % -) 1 # , / * ý % " 0 & 1 " $ 2 & ! " 0 , › " / & + $) ,) ! 3 & " , + ! " 0 1 & + 1 & , + ý their own profile noting their knowledge specialties, such as budget travel, culinary experiences or travelling with children. Travellers can select a guide that is the right fit for their needs and receive customised advice in four ways: a 30-minute conversation (USD$15), a custom-made itinerary (USD$25), a map with key destinations (USD$10) and 20 text messages prior to and during the trip (USD$15). % " - / & & + $ & 0 › , / !) " + ! 4 , / 1 % 6 0 - " + ! # being well informed and experiencing places like a true local. The longer term benefits of this type of immersive travel include the building of empathy, knowledge and respect for other cultures and their unique customs.

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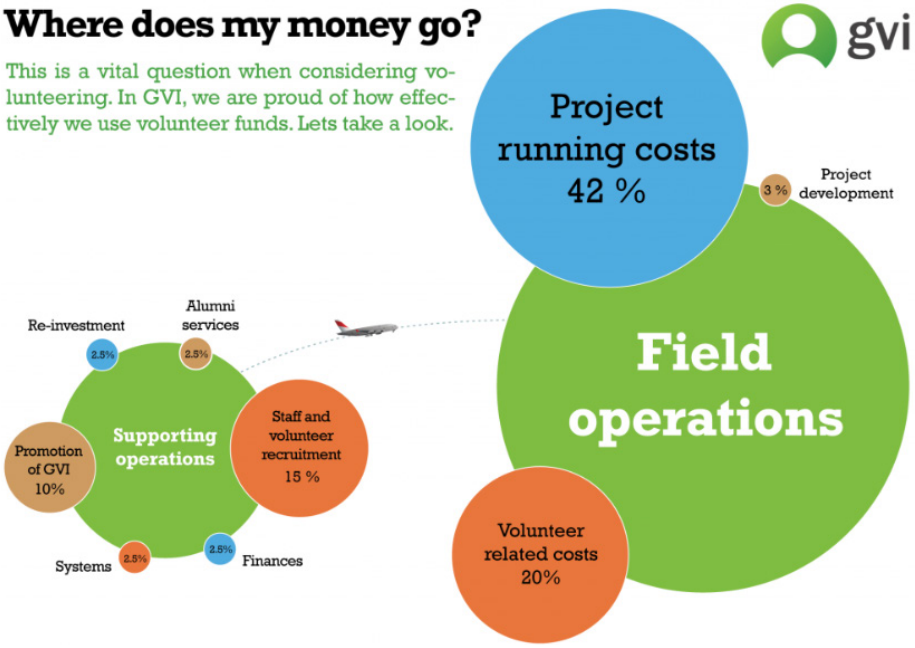
iAmsterdam,
Amsterdam, Netherlands

Reframed destinations

Cities are also strategically reframing the experience of tourists for the purpose of their own sustainability. An excellent example is i Amsterdam'sinclusive response to the city's over-tourism. Rather than capping or ticketing visitors, the city is directing tourists to wonderful lesser known parts. This is supported by a widening of the radius of the public transport City Card to make new ! " 0 1 & + 1 & , + 0 " 0 0 &) " + ! › , / !) " ý , / ! & + Traveller, data mining of the City Card and live video feeds of crowded attractions has also helped 50 per cent of visitors change their sightseeing preferences, allowing them to favour low-peak time 0) , 1 0 þ 4 & 1 % × Õ - " / " + 1 3 & 0 & 1 & + $! & › " / " + 1 can learn from the way in which Amsterdam has leveraged the power of user research to create sustainable and inclusive solutions.



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Global Vision International,
Global locations

Impact

Conscious consumption has been on the rise in recent years and is marked by cohorts who use their spending power to support businesses with positive social and environmental practices. According to the Guardian, 71 per cent of millennials want brands to be environmentally friendly and ethical and 61 per cent want them to connect with a cause or social issue. Ethical consumers are now turning to their next precious commodity – time – to engage in travel experiences with a humanitarian impact.

While this type of ‘voluntourism’ has been around for a number of years, recent consumer demands for transparency and , 2 + 1 &) & 1 6 , # " 0 1 - / 1 & " 0 þ / " 0 % & ž & - these operators. One in particular is Global Vision International (GVI), a leading global provider of impactful experiences across education, construction, health and conservation. Knowing that transparency builds credibility, GVI has published its financial modelling on its website, allowing prospective travellers to see exactly how their money is spent. For GVI, 65 per cent of volunteer funds go directly to the projects at hand. To account for the remaining 35 per cent, an " 5 -) + 1 & , + , + 1 % " & * - , / 1 + " , #) , + $ 1 " / * & - ensure program continuity, sustainability, relationship building and minimising disruptions with the local community is also presented.

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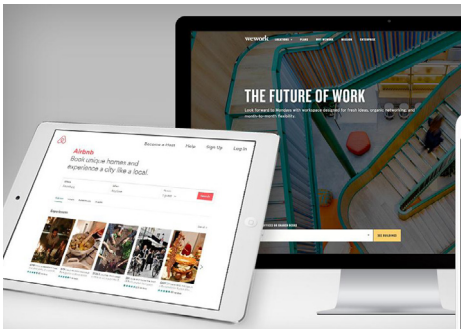
Discover Corps,
Global locations

Discover Corps & 0 + , 1 % " / , - " / 1 , / , › " / & + $ 1 2 / + (" 6 vacations and presents a degree of transparency regarding its practices. Its model for working with communities is based on partnerships with local service organisations who need resources and have strong relationships with local stakeholders. As opposed to ‘parachuting in’, this approach provides a supporting role to the existing operators in the community. For additional experiential components (e.g., accommodation, excursions and lectures), Discover Corps’ purchasing policies intentionally channel revenue to small-scale suppliers, supporting local economies whilst providing travellers with a more immersive experience.



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Airbnb and WeWork,
Global locations

Business

The mobile workforce, or digital nomads, are the early adopters of a lifestyle that blurs the boundaries between work and travel. Corporate business travellers are gradually following the trend, and as a result, we are seeing the rise of local companies and major platforms stepping in to facilitate experiences that are more localised.

One partnership of note is between Airbnb and WeWork, arguably the largest companies in their respected sectors. In this new venture, 2 0 & + " 0 0 1 / 3 ")) " / 0 4 % , , , (1 % / , 2 $ % & / + 1 % " + " / " 0 1 " , / (, › & " 1 , 1 % " & / , * * , ! 1 & , represents a move to lure younger corporate travellers whose lifestyles already function around the sharing economy and have localised preferences in travel. According to Bloomberg, Airbnb expected corporate travel on its site to quadruple in 2017; however, the next step will be to capture executives who value higher levels of luxury and convenience.

Ch. 3/4

Accommodation

Quick reference
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p.21 Branded stays
p.22 Homes
p.24 Ephemeral

Lifestyle brands, on-demand hotels, exclusive member clubs and kit camp sites are showing the / " ! 1 % , # , * * , ! 1 & , + , + , › " / ý

Accommodation types are becoming increasingly diverse. Brands and start-ups are keen to carve out a unique position in the experience economy, knowing that where one stays can be an experience unto itself. We are seeing this manifest across lifestyle brand hotels, homes as destinations, and ephemeral accommodation.

In the retail sector, understated lifestyle brands are showing their luxury counterparts that they too can have a stake in the hotel market, saving on set-up costs and capturing a new end of the market. Looking at housing, Airbnb has influenced the creation of a number of other shared and membership home models that are occupying their own niche in both budget and luxury markets. Finally, established hotel chains are seizing new opportunities in leveraging temporary experiences, " , * & + $ + , 3 ") 3) 2 " ! ! 1 , , + " , › " 3 term trips.

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Muji Hotel,
Shenzhen, China

Branded stays

Lifestyle brands are moving into the hotel sector in a bid to build loyalty, expand their reach and test new product. Such ventures have been executed by luxury brands for many years and enjoyed as status symbols by their clientele. Now customers with lower budgets + " 5 - " / & " + " 1 % " / + ! 0 & + 4 % & % 1 % " 6 % to Claire Bennet, executive vice president of American Express Travel, consumers are seeking lifestyle-inspired, design-focused hotels, observing a 30 per cent spike in bookings for these types of hotels in the US for 2017.

Minimalist Japanese brand, Muji, for instance, has recently launched its first hotel in Shenzhen, China. Though managed by a third party, the interior design and amenities have been executed by the brand, and includes their signature muted palette of natural timbers, textured linens and towels, and attention to detail in spatial and product design. Enabling customers to live in the brand takes products from a decorative to a utilitarian function, hopefully leading to sales conversion.

From a strategic perspective, lifestyle brands that enter the hotel space have what branding expert Erich Joachimsthaler describes to Bloomberg as an ‘adjacent fit’ of complementary markets. In the case of Muji, the key products are furniture and décor, enabling cost savings in furnishing the hotels with Muji stock.

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Third Home,
Global locations

Homes

Opting to stay in a private home is a growing preference among travellers seeking localised experiences. While Airbnb dominates the mass market in this sector, there are other players with niche , › " / & + $ 0 & + - / & 3 1 " % , * " , * * , ! 1 & , + ý

At the luxury end of home sharing is Third Home, a private property and travel club for owners of luxury second homes. The club is invitation only and allows members to list their second home for other club members to visit and, in exchange, have access to a global repository of luxury homes to visit themselves. Third Home makes its revenue through membership fees, 'exchange fees' (a cost incurred when booking a property) and through its new Travel and Concierge program – a service that curates itineraries and manages logistical details (transfers, car hire, etc.) to ensure a seamless journey.

Another interesting feature of the Third Home model is its partnerships with property developers specialising in luxury resorts and fractional properties. Developers with the right calibre of - / , ! 2 1 + , › " / % & / ! , * " * " * " / 0 % & - 1 , 1 % 2 6 " / 0 þ 1 % " / " 6 - / , 3 & ! & + $ 0 1 / , + $ - , & + 1 , # access to a global pool of holiday properties. Giles Adams, Partner and President of Third Home for Europe and Asia, imparts that in the next ten years, people will not own a second home without it being › &) & 1 " ! 4 & 1 %) 2) & (" % & / ! , * " , / 0 & * & particular will view assets in terms of the ancillary value they can add to their lifestyle.

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Tentrr,
U.S.A

On the more rough-and ready end of the spectrum, the camping industry is also being disrupted by new shared models of accommodation. To depict the value of the market, a report by the Outdoor Foundation states that USD$24 billion is spent annually on camp sites across the US. This is based on a figure of 598 million nights a year taken camping, at an average spend of USD$40 in expenses and fees per night.

Having personally experienced less than idyllic campsites, Michael D'Agostino foundedTentrr, the Airbnb for camping. The platform allows prospective campers to find and instantly book private camp sites, hosted by private land owners. Keeping it simple for land owners, a one-time membership fee of USD$1500 is outlaid, which includes the set-up of a standardised accommodation 'kit': a canvas tent set on an elevated deck with beautifully designed amenities, including an air mattress, rain shower, picnic table and fire pit, among others. The kit makes it easy for campers to drop in for an experience, reducing time spent in preparation.

The value of such a platform is in its ability to remove the barrier to entry and capture new markets. According to Bloomberg Pursuits, Tentrr logged 1500 bookings in early 2017, with 40 per cent of those bookings by people who'd never gone camping previously. Further to this, D'Agostino estimates that for every 100 Tentrr sites, USD$1 million will be injected into the local economy – by the way of land owners receiving a percentage for hosting, the cost of utilities, as well as the purchasing of local goods by guests.

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Marriott tents,
Coachella Festival,
California, U.S.A

Ephemeral

Elevated events

What drives the greater experience economy is consumer desire to collect memorable moments and stories. Accommodation providers / " 1 - - & + $ & + 1 , , + " , › " 3 " + 1 0 1 , / & 0 " 1 % "

A good example is Marriott's partnership with US music festival , % ")) ý 1 % " / 1 % + * - & + $, 2 1 & + 0 % 6 safari tents on the festival grounds, which are furnished in the same ! , / 0 1 % " & / , 2 1 & . 2 ") & # " 0 1 6) " - , / 1 # ,) & , ý viewing areas, fast check-in, private washrooms and golf cart shuttles to the festival, elevating the typical overnight stay at a festival into one that is pampered and full of perks. In a strategic move to appeal to exclusivity, and capture new followers, only eight tents are available and are only open to members of Marriott's reward programs, Marriott Rewards Experience Marketplace and SPG Moments, via a points auction and ballot.