zicasso

Zicasso 2025 Travel Trends

The Luxury Travel Report

About Zicasso

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

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

We have over 24,000 5-star reviews and an average 4.9 rating.

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

About This Report

December 2024

Our analysis draws on over 100,000 trip requests from Zicasso travelers and a robust survey of our traveler community, plus in-depth insights from top travel specialists and destination experts.

In addition, we performed a detailed survey from the top 100 Zicasso in-country specialists on traveler and trip details for 2025, as well as the trends they are seeing for planning and bookings in their regions.

The Zicasso Luxury Traveler

Accessible Luxury

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

While we handle many trips priced over $100k, the bulk of our travelers spend in the $6000-$8000 range per person, for an average vacation duration of 13.5 days. As such we provide "accessible luxury" for our audiences with exceptional, memorable experiences.

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

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

Overview of Key Findings

- Spring and fall bookings have continued to rise, particularly in Europe and Latin America, as travelers aim to avoid peak-season crowds.
- There is a strong preference for unique, culturally immersive experiences, especially in Asia, where travelers prioritize local interactions over traditional luxury with activities that include culinary tours and authentic engagements.
- Demand spans all traveler types—from families and couples to solo travelers and multi-generational groups—highlighting the need for adaptable, personalized itineraries that cater to diverse interests within single trips.

Through this comprehensive approach, we've uncovered key trends shaping the evolving travel landscape, including how travelers are increasingly opting for spring and fall, indicating a strong move away from traditional peak seasons. Spring shoulder season currently represents 49.3% of 2025 bookings as of November 2024, showing growing interest in shoulder season travel with notable growth in Europe and Latin America as travelers seek quieter experiences outside of summer. May has emerged as the top travel month for 2025, followed closely by April, while September is a more popular month to travel than August. This shift underscores a preference for luxury travelers interested in travel during less crowded periods, especially to popular destinations facing overtourism.

Top travel month for 2025

May

49.3%

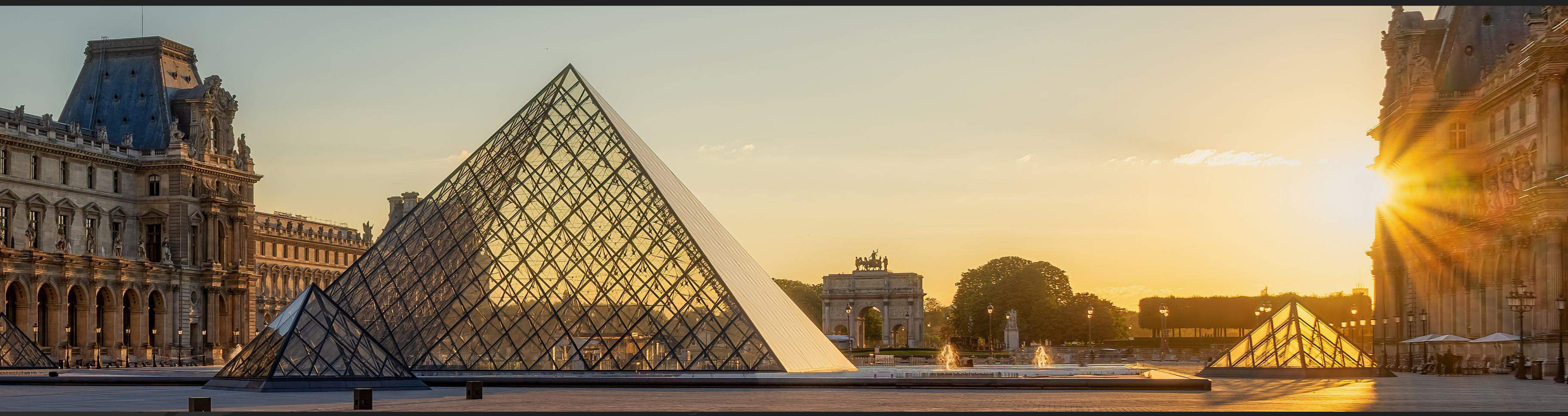
Spring shoulder season

Luxury travelers are showing a clear preference for immersive and culturally-rich experiences, moving beyond high-end accommodations alone. In Asia, particularly, 76.3% of travel specialists reported that cultural authenticity is a key driver for booking conversion, highlighting an emphasis on authentic engagement. Popular experiences include food tours across Southeast Asia and spice route tastings in the Middle East and North Africa, as well as in-depth cultural interactions, which align with travelers' increasing focus on meaningful connections with local traditions.

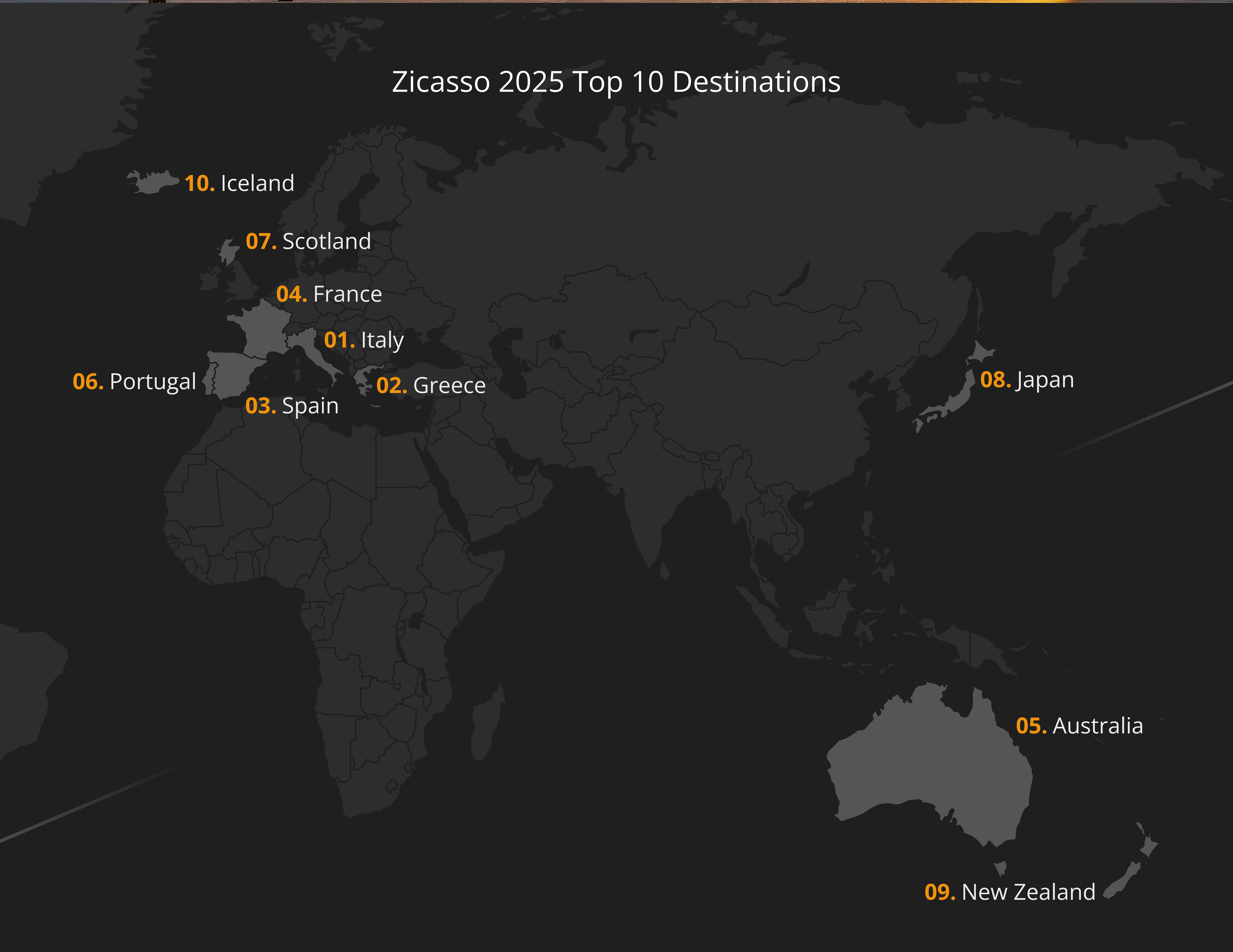
Luxury travel's appeal spans multiple demographics, with notable demand from families, couples, solo travelers, and multi-generational groups. Multi-generational travel, however, presents unique planning challenges, requiring flexible itineraries to accommodate varied interests. Diverse demographics booking across all regions highlights the need for adaptable, customized travel experiences, particularly for multi-generational trips, which often require a balance of activities suited for all age groups.

Our Data Comes from the Following Regions

- Africa
- Asia/Southeast Asia
- Europe
- Latin America
- Middle East & North Africa
- South Pacific



Zicasso 2025 Top 10 Destinations



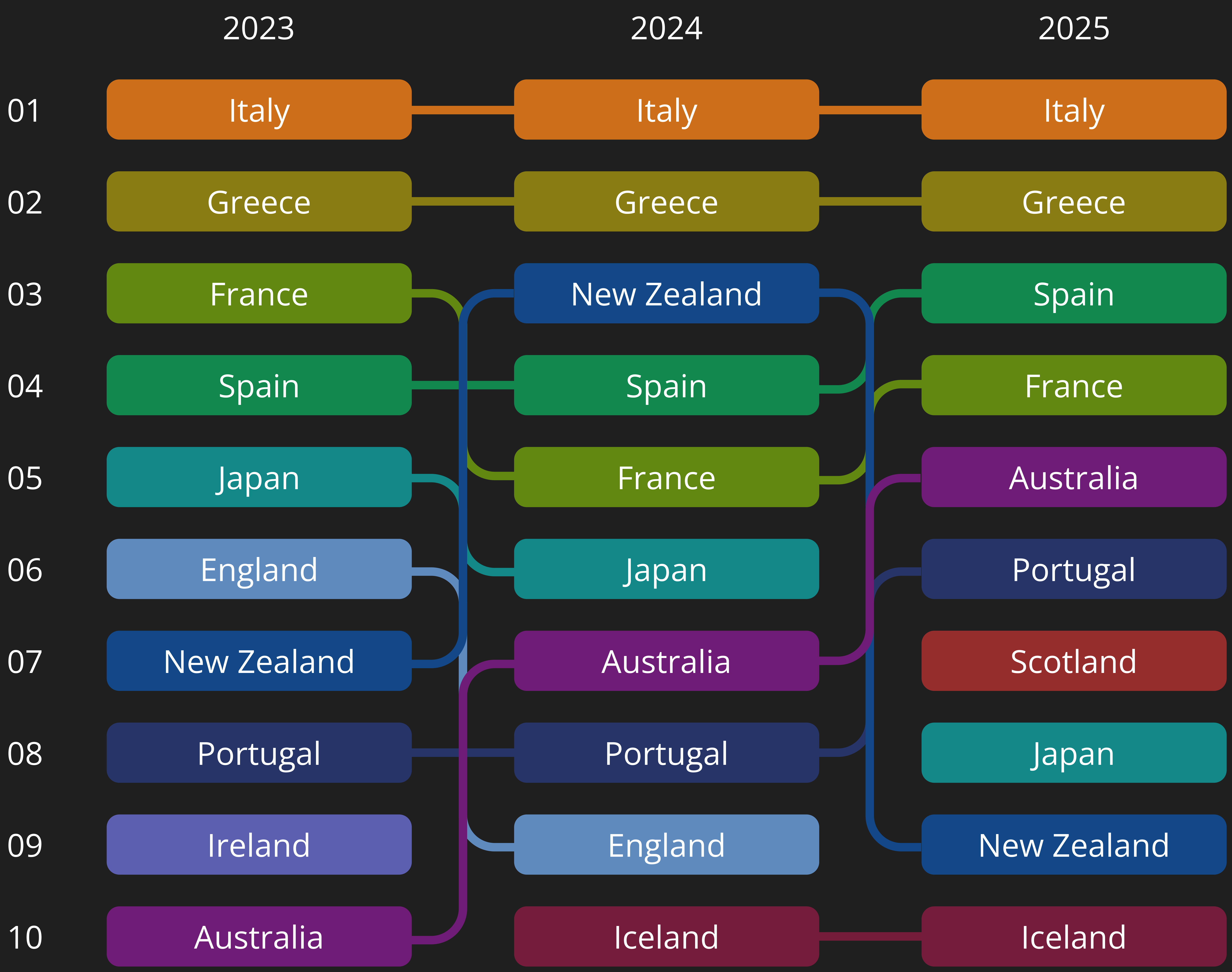
2025's Most Popular Destinations vs. 2024 and 2023

Stability in Major Destinations

- Italy (+4.2% share growth) and Greece (+1.7% growth) remain dominant
- Mediterranean destinations showing strongest overall growth
  - France growing to the #4 position over its 2024 spot at #5
- Notable shift: Portugal shows strong upward movement to 6th place

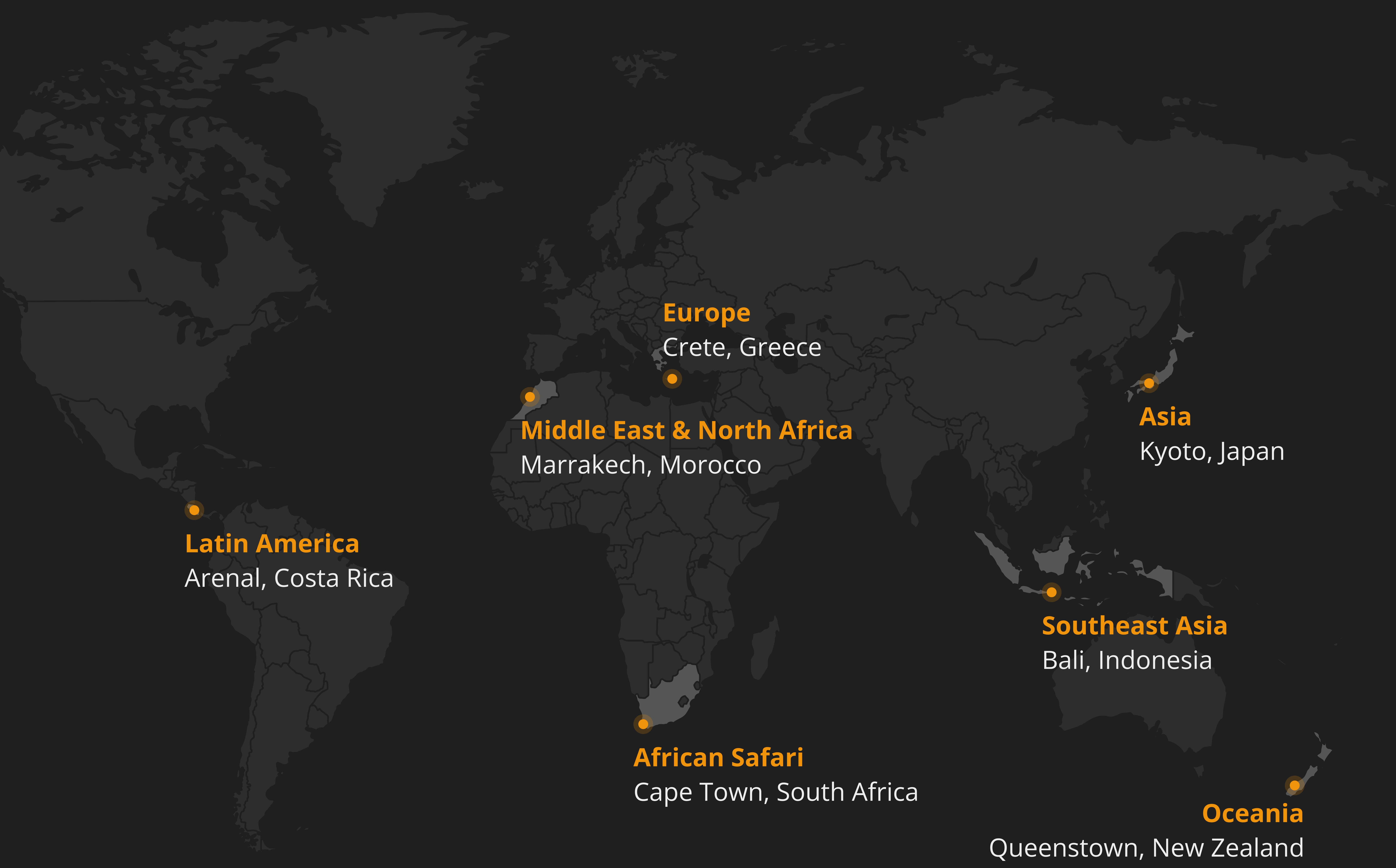
Significant Changes

- New Zealand saw a decrease from #3 in 2024 to #9 in 2025
- Japan dropped from 6th to 8th place
- Scotland has shown surprising growth from 13th place in 2024 to 7th in 2025



Top Destinations by Region

(excluding the well-trodden capitals)



Zicasso Traveler Requests

These are traveler asks, needs, and desires they express most when filling out their initial Zicasso trip request form

Further Findings from All Regions

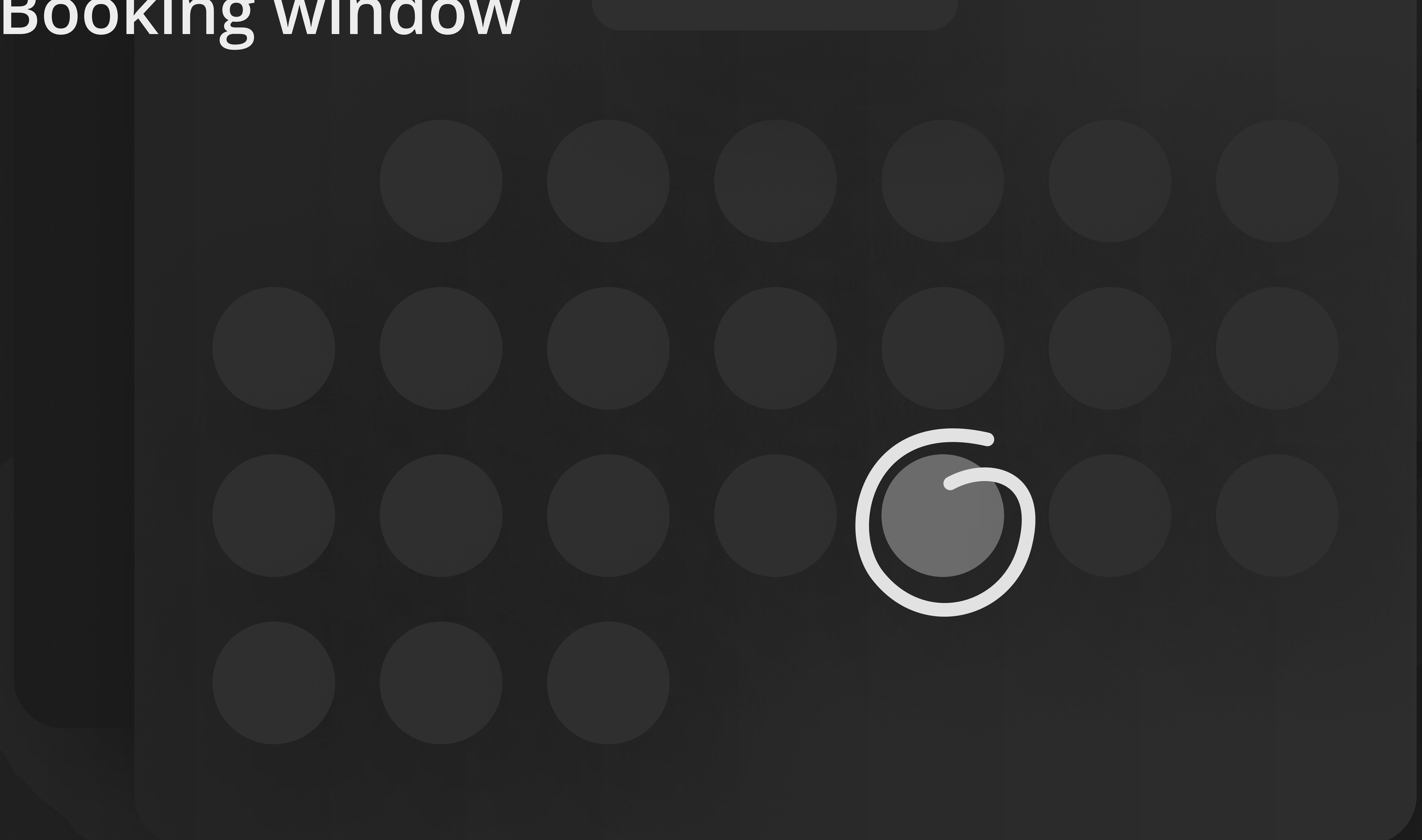
In 2025, luxury travel demonstrates a notable shift in demographic patterns, with an unprecedented even distribution across age groups. While travelers aged 51 and above show the highest conversion rates, the complexity of luxury travel planning is evident in the average 188-day booking window (up slightly from 184 days in our 2024 findings).

This extended lead time reflects the intricate nature of personalized luxury experiences compared to mainstream travel, requiring detailed coordination of specialized accommodations, unique activities, and customized services.

The data suggests a growing sophistication in travel preferences across all age brackets, with particular emphasis on tailored experiences that demand meticulous planning and execution.

188 day

Booking window



Changes in Demand Among Different Traveler Types (2025)

Single Destination Focus

- A modest increase in single-destination trip interest to 74.4% vs 64.5% in 2024, and single country travel remains the dominant trip type

Trip Duration Changes

- Average duration is steady: 13.5 days (2025) vs 13.4 days (2024)
- Early planners (8-12 months in advance) are booking longer trips than short-term bookers
- Multi-generational family growth

Shift in Group Composition

- With more flexibility, such as not being held to school schedules, there is a notable increase in shoulder season bookings for couples acting as the primary driver of May and September bookings

Changes in Demand by Age Group

Nature/Wildlife Interest Increasing with Age

- Particularly strong in 65+ demographic
- Growing interest in 31-50 age group compared to 2024

Activity Level Variations

- Younger groups (18-30): More romance/honeymoon focused
- Middle groups (31-64): More adventure/activity focused
- Older groups (65+): More cultural/wildlife focused

Interests were Steady from 2024 to 2025

- Largest Increases:
  - Food in 18-30: +3.6%
  - Culture in 18-30: +3.6%
  - Wildlife in 31-50: +1.2%
- Largest Decreases:
  - Honeymoon in 18-30: -2.2%
  - Adventure in 51-64: -0.7%
  - Wine in 65+: -0.6%

Previously, younger travelers primarily focused on food, wine, beach, and romance, while culture drew interest across all ages, especially older demographics. However, in 2025, we're observing a shift, with younger travelers now increasingly interested in culture and history as part of their journeys.

Even with these noted fluctuations in interest, the data reveals remarkable stability in traveler preferences year over year. While there are shifts, such as a rise in interest in food and cultural experiences among younger travelers and a slight dip in honeymoon and adventure travel in specific age groups, the core interests—food, culture, wildlife, and adventure—continue to resonate strongly across all demographics.

Top Travel Inspiration Sources for Travelers

- 58% of respondents cite personal recommendations as a primary inspiration source
- Traditional media still holds value, with 42% of respondents inspired by travel magazines and blogs
- Google is a top tool for 35% of travelers looking to discover new destinations

Top Traveler Interests Across Destinations for the Luxury Traveler

- Authentic cultural experiences
- Unique, once-in-a-lifetime experiences
- Personalized activities
- Exceptional service and attention to detail

Emerging Interests

- 16.7% of our travel partners noticed an increase in requests for eco-friendly and sustainable luxury options
- 22.3% of our travel partners have seen an increase for exclusivity and privacy
- 6% of our travel partners mention an increase in wellness and retreat experiences

Approximately 80% of travelers prefer itineraries that include well-known destinations, while only about 20% seek more unique, off-the-beaten-path experiences.

- Around 80-90% of travelers focus on popular highlights, especially for their first visit
- Approximately 10-30% of repeat travelers are interested in exploring off-the-beaten-path destinations

Content That Drives Engagement

- 71% of respondents wanted itinerary suggestions and travel information from our guides and travel partners
  - This type of content helps our travelers feel informed, inspired, and confident in their travel choices, making it a key factor in their decision-making process
- 63% of respondents are interested in destination inspiration, including travelers looking for off-the-beaten-path experiences or shoulder season travel such as to unique islands in Croatia or the winter mountains in New Zealand
- 44% of respondents are looking for content around authentic and immersive experiences, such as a scenic coastal drive on a secluded beach or a private-guided street food tour in Southeast Asia

Preference for Upscale Accommodations and Experiences (2025)

Among Zicasso Travel Specialists

Clear Luxury Definition

- High-end accommodations (62%)
- Personalized service (58%)
- Unique experiences (54%)

Value Alignment

- 85.4% are flexible with budget
- Strong correlation between budget flexibility and successful bookings

The data suggests a nuanced picture: while luxury travelers are willing to spend for unique, high-quality experiences, they are also more informed and may have higher expectations for the value they receive. There are indications of a slight tightening of purse strings in terms of seeking the best value within the luxury segment, rather than a significant reduction in overall spending.

Among Previously Booked Zicasso Travelers

- Premium travel service (50.3%)
- Luxury travel service (22.8%)
- Total premium/luxury perception (73.1%)

This data demonstrates that Zicasso travelers prioritize premium and luxury services, reflecting their strong preference for elevated travel experiences.

Among Previously Matched Zicasso Travelers

- High-end accommodations (62%)
- Personalized service (58%)
- Unique experiences (54%)

Most Significant Obstacle Preventing People from Booking

High Cost Relative to Expectations

- Many respondents cited that the cost was too high, even after providing a budget
- Price/cost/budget call-outs appear in 35% of responses

Timing and Personal Schedule Conflicts

- Several travelers postponed or canceled due to personal reasons, such as family commitments, health issues, or conflicting schedules

Geopolitical concerns were not mentioned to the same degree as in 2024.

Unusual Seasonal Patterns for Travelers (2025)

1. 50.7% of the responses focus on seasonality, weather, and crowds themes
2. There are notable changes in traditional shoulder seasons
3. A subtle but steady shift toward spring months (March-May)
   - 2023: 40.6% of trips
   - 2024: 40.8% of trips
   - 2025: 41.6% of trips
     - May 2025 is currently the most popular month for bookings
     - April is the second most popular month
     - September bookings surpassed August in 2025
4. Strong preference for shoulder seasons
   - Concern is around peak season availability
   - Repeat travelers better understand the value of off-peak travel

The travel industry across segments has seen a drop in fall bookings 2024. As we continue booking new trips for 2025, we will revisit how many people are booking their trips for September and fall to learn more about when our travelers prefer to take their trips.

January	February	March	April
May	June	July	August
September	October	November	December

Less busy — Most busy

Emerging Travel Trends & Unique Findings for 2025 Bookings

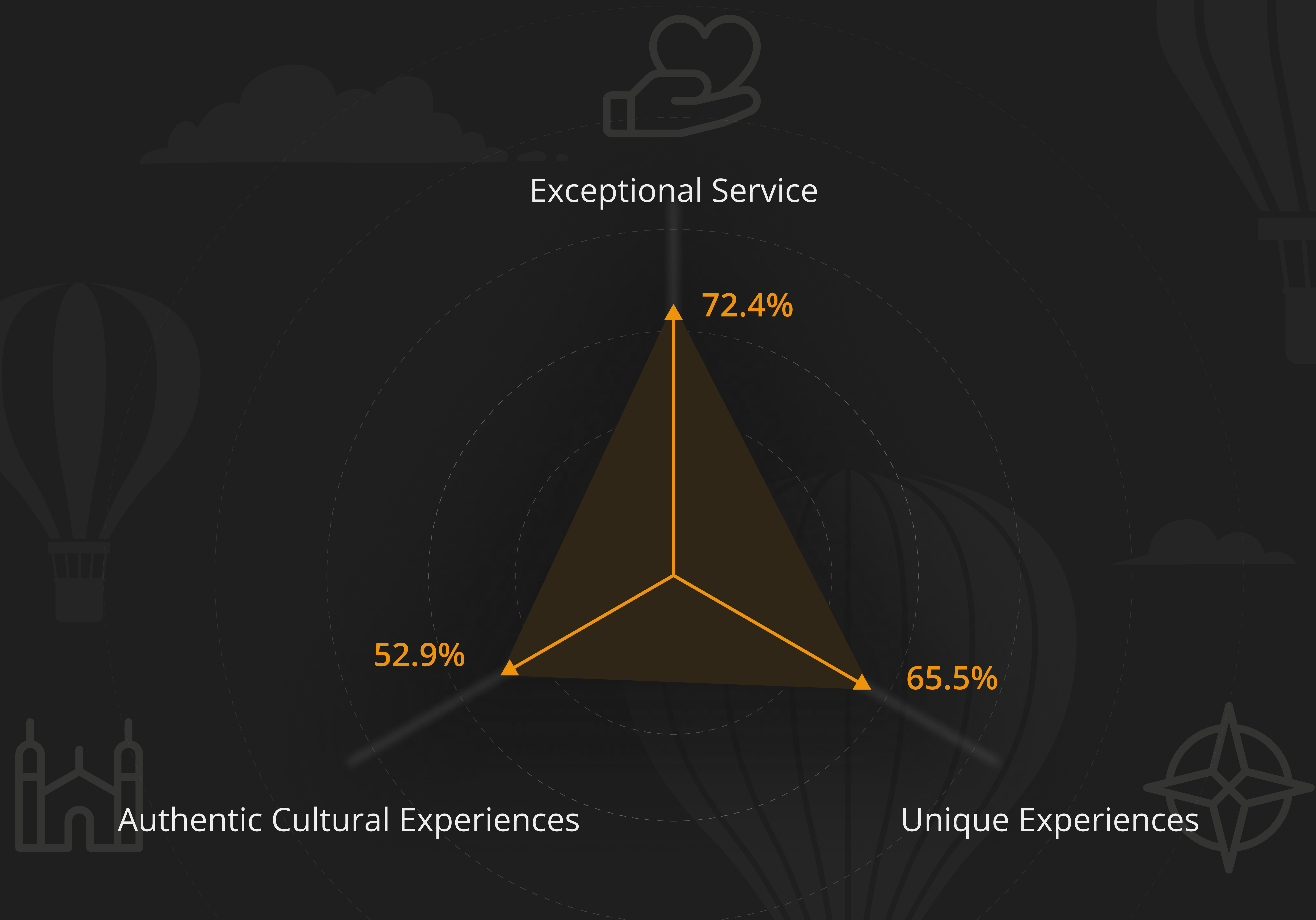
Travelers in 2025 are showing a strong preference for single-destination immersion, longer stays, and earlier booking patterns. There is increased emphasis on premium experiences with flexible budgets, while maintaining a desire for cultural authenticity and exceptional service.

1. 80% Early Booking Emphasis

- Consistent messaging about booking early across specialists
- Most recommend 8-10 months advance booking
- Early planners booking longer trips (13.5 days vs 11.6 days average)

2. 72.4% Place Priority on Exceptional Service

- Exceptional service and attention to detail are most frequently highlighted as important to travelers who have booked and are looking to book with Zicasso
- 65.5% seek unique, once-in-a-lifetime experiences
- 52.9% emphasize the importance of authentic cultural experiences



Emerging Travel Trends & Unique Findings for 2025 Bookings

3. 85.4% Budget Flexibility

- Strong correlation between budget flexibility and successful bookings
- 73.1% of repeat Zicasso travelers prioritize premium and luxury services
- 26.1% plan without major cost concerns

4. Multi-Country Planning vs. Single-Country Planning

- 58.3% of travelers who choose multiple counties do so because the two countries are geographically close and easy to combine
- 29.4% of travelers who choose multiple counties do so to maximize the number of destinations in a single trip
- 76.2% prefer single-country focus
  - A trend toward depth over breadth in travel experiences

5. Trip Requests are More Likely to Want Multiple Destinations

- Often cite "value for money" in multiple destinations
- But successful trips often focus on depth over breadth

Emerging Travel Trends & Unique Findings for 2025 Bookings

6. Experience Priority Shift

- Cultural immersion (64.1%)
- Personalization (59.7%)
- Unique experiences (56.6%)
  - Successful bookings correlate with a shift from logistical to experiential focus

7. Bucket List Destinations Are a Consistent Starting Point

- 64.5% booked and 76% inquirers look for content around their bucket list destinations

8. Food and Culture Remain the Most Important Interests for Travelers in 2025

- Food and culture took the #1 and #2 spots respectively on our list of the most mentioned interests for our travelers
  - Food experiences
  - Culture
  - Wine
  - Wildlife and hiking (tied)

28%

Social Media

VS

42%

Traditional Media

28% of respondents cite travel inspired by social media, vs. 42% inspired by traditional media like travel magazines and blogs

Industry Assumptions of AI vs. Reality

Only 2.5% of survey respondents mentioned using AI digital tools as part of their travel planning or decision-making process. This low uptake indicates that these technologies are currently not significant decision drivers, especially for luxury or high-touch travel planning, where personal recommendations and tailored experiences hold more value.

Despite the growing focus on AI in the travel industry—whether through chatbots, virtual travel planning assistants, or digital itinerary generators—these tools are not influencing travelers in a way that substantially impacts bookings or planning. This demonstrates a gap between industry innovation and actual user adoption within this particular market segment that prefers personal and personalized attention.

While AI tools could potentially streamline tasks like preliminary trip planning, communication, and logistics, the lack of usage from travelers implies that they may not yet see these tools as essential for enhancing client interactions or booking success. The data highlights that travel specialists rely more on personal touchpoints, relationship-building, and deep destination knowledge, which align better with client expectations in luxury travel.

As travelers show limited enthusiasm for AI-driven services at this time, ***tech integration should remain focused on supporting specialists rather than replacing human elements of the experience*** demonstrating the importance of the human touch within the travel experience.

The Value of Personal Connections With Destination Specialists in Luxury Travel

Analysis of Zicasso travel specialist testimonials reveals a striking pattern in successful luxury travel experiences. Among the collected feedback, 43% specifically highlight moments of personal connection as pivotal to the journey's success. These range from travel designers welcoming clients into their homes to guides transforming unexpected challenges into meaningful experiences, such as converting a rained-out activity in New Zealand into a deeply personal tree-planting and eco-friendly experience at the guide's property.

Crisis management capabilities emerge as a crucial differentiator, with 28% of notable stories involving successful crisis navigation. The responses demonstrate not just problem-solving ability but comprehensive support infrastructure. From coordinating immediate medical care in Croatia to seamlessly arranging travel alternatives when personal emergencies strike, these instances showcase the value of having a dedicated team during unexpected situations.

Local knowledge depth appears in 35% of the success stories, manifesting in unique ways that transcend traditional tourism. This includes accessing community resources in remote areas, arranging reunion events through local associations, and providing insider experiences that would be impossible without deep community connections. The pattern of "local," "authentic," and "personal" appears consistently across these narratives, appearing in 67% of the stories highlighting unique experiences.

Service flexibility represents another key value proposition, with 31% of stories specifically mentioning adaptation to client needs. Most notably, the ability to accommodate special requirements - from dietary restrictions to mobility issues - appears as a recurring theme. The successful management of these adaptations, particularly in challenging destinations or circumstances, demonstrates the value of working with experienced partners.

Perhaps most significantly, 52% of the highlighted stories involve repeat travelers and long-term relationships. This pattern suggests that the combination of personal connection, 24/7 management, local knowledge, and service flexibility creates lasting client relationships. Sentiments around returning and relationships are cited frequently, often accompanied by emotional descriptors such as "trust", "family", and "understanding."

These findings suggest that luxury travel success relies not just on destination knowledge or service quality, but on the ability to create personal connections, provide comprehensive support, and build lasting relationships. The high percentage of repeat travelers and multi-generational clients indicates that these values resonate particularly strongly with sophisticated travelers seeking more than just destination experiences.

Recent Traveler Stories from Zicasso's Specialists

Sydney

I had a recent traveler who had spent 2 years at school in Sydney back in the 70's when her family was living here temporarily. I contacted the Old Girls Association and arranged for a tour of the school with her husband and daughter. The Old Girls Association also reached out to some of her classmates to reconnect

Costa Rica

We had a traveler book a second trip to Costa Rica before even making the first one. For the first trip, he was traveling with his friends, but by the time of booking, he was so confident in our service and expertise [...] that he booked a second trip for that same year to visit Costa Rica with his family. An instant repeat traveler!

Japan

I actually went out as a Guide for a couple of days with a dad and his 2 teenage sons to Japan. The Dad was going through a divorce, and he wanted his kids to have fun... One of the Sons was never going to take a traditional Hot Springs bath, it was a definite NO! Then one day later the Father confided in me that his Son came to the public bath and enjoyed it the most. This brought the family even closer together in spite of a hard time.

Recent Traveler Stories from Zicasso's Specialists

Morocco

Marjan initially planned a trip with her mother, but due to unforeseen circumstances, she had to cancel. Understanding the situation, we offered her full flexibility and no cancellation penalties... This allowed us to reschedule a longer, more detailed trip for the following year... This trust has led to a lasting relationship where flexibility and personalized care made all the difference.

Vietnam

Mr. Justin and his family visited Vietnam... taking their father back to his homeland... During their stay, I surprised Mr. Justin's father with a small Vietnamese cyclo, something he had fondly mentioned as memorable... On their last night, our guide made a special effort... arriving at their hotel with ingredients for banh mi sandwiches, having driven to his favorite spot to fetch them after hearing their cravings

African Safari

We have a traveler who is planning her 4th trip with us, she sent her travel designer the most beautiful bunch of flowers, sends Thanksgiving and Christmas messages, and is so thankful for the experiences we have created for her, which have transformed her life.

African Safari

Top 5 Most Requested Destinations in Africa

1. Cape Town, South Africa
2. Kruger National Park, South Africa
3. Okavango Delta, Botswana
4. Maasai Mara, Kenya
5. Victoria Falls, Zambia/Zimbabwe

Key Trends

- Growing appeal due to perceived greater value for money
- Heavy emphasis on exclusive experiences
  - Stronger emphasis on sustainable luxury
- Earlier booking requirements for safaris

Notable Concerns Regarding African Safari Travel

- Preconceptions around safety management
- Luxury safari pricing concerns
- Seasonality less important than wildlife viewing
  - Safari regions are seeing increased interest in combining wildlife viewing with cultural immersion (64.1%)
- Focus shifting from just wildlife viewing to more comprehensive cultural experiences
  - Need for authentic experiences: 76.3% overlap with eco-friendly experiences (13.2%)

Pricing & Booking Patterns

- Budget flexibility correlates with successful bookings
- Strong emphasis on early booking (8-10 months advance recommended)
  - Successful sales correlate with longer lead times: non-fulfilled requests average 384.9 days vs. fulfilled requests 310.4 days

Asia/Southeast Asia

Top 5 Most Requested Destinations in Asia/Southeast Asia

1. Kyoto, Japan
2. Tokyo, Japan
3. Bali, Indonesia
4. Yogyakarta, Indonesia
5. Lombok, Indonesia

Key Market Changes

- Japan dropped from 6th to 8th place (-0.2% decline)
- Japan seeing significant price increases
- Year-round travel becoming the norm (especially Japan)

Seasonality Shifts

Traditional shoulder seasons are shrinking

- Japan reporting "no low season anymore" (noted in Unexpected Findings)
- May-June and September reported as traditional shoulder in Southeast Asia
  - Now seeing bookings spread throughout year, specifically in places like Bali
- Traditional June-August and November-December peak shifting in Southeast Asia
  - September-October becoming new high season

Booking Patterns

- Strong emphasis on early booking across 80% of specialists
- Advance planning crucial (8-10 months recommended)
- Price increases tied to currency fluctuations

Experience Priorities

- Cultural authenticity emphasis (76.3% of responses)
- Strong correlation between authentic experiences and pop culture experiences (83% overlap)
- Cultural immersion/expert access priority (64.1%)
- Travelers in Bali still focus on main highlights due to limited time (90%)

Lead Time Patterns

- Southeast Asia shows shortest lead times among all regions
  - Average 188 days vs. regional average of 349 days
- Higher flexibility in dates
- Strong last-minute booking trend

Unexpected Growth

- Vietnam entering the top 20 sold destinations for the first time
- Thailand showing stronger winter bookings than the traditional peak season
  - Thailand reporting earlier booking requirements
- Single-country focus increasing with 69.51% in 2025 vs 64.5% in 2024

Key Activities/Interests/Trends

1. Experience Evolution
    - 46.4% of partners for Southeast Asia mentioned travelers look for "authentic local experiences"
    - Cultural immersion prioritized over luxury accommodations
    - Increase in requests for private/exclusive experiences
    - Cultural Immersion & Heritage Experiences (76.3%)
        - Traditional craft workshops
        - Local market exploration
        - Temple visits and spiritual experiences
    - Culinary & Food Experiences (68.4%)
        - Local cooking classes
        - Street food tours
        - Tea/Sake tastings
    - Urban-Nature Blend Experiences (54.2%)
        - Hot springs experiences in Japan
        - Island hopping in Southeast Asia

2. 50% of our Asia travel specialists surveyed noticed a rise in heritage travel in Vietnam, including an emphasis on family customization

Asia's 2025 travel landscape reveals a complex evolution beyond traditional patterns. The elimination of distinct seasons in Japan, coupled with Southeast Asia's booking pattern shifts, indicates a mature market adapting to year-round tourism. The high correlation between cultural and pop culture experiences (83%) suggests sophisticated travelers seeking both traditional and modern Asian experiences, regardless of season. This transformation, combined with diverse country-specific trends, points to a region where customization and cultural authenticity drive travel decisions more than traditional seasonal considerations.

Europe

Top 5 Most Requested Countries in Europe

1. Italy
2. Greece
3. Croatia
4. France
5. Spain

Top 5 Most Requested Destinations Beyond Europe's Major Cities

1. Crete, Greece
2. Dubrovnik, Croatia
3. Amalfi Coast, Italy
4. Santorini, Greece
5. Hvar, Croatia

Surprising Destination Mentions

1. Piedmont, Italy - A region gaining attention for wine and cuisine
2. Açores, Portugal - Known for its natural beauty and volcanic landscapes, slightly off the typical tourist path
3. Bayreuth and Leipzig, Germany - Smaller cities with rich cultural and historical significance, especially in classical music

Changes in Top Destinations from 2024 - 2025

- Italy: 26.5% of total requests (+4.2% growth)
- Greece: 15.4% (+1.7% growth)
- Spain: 4.8% (-0.19% decline)
- France: 3.9% (-0.8% decline)
- Portugal: Subtle growth (+0.8%), moving to 6th place

Seasonality

- Spring months increasing: 41.6% of trips (up from 40.8% in 2024)
- May 2025 most popular month
- September showing significant decrease
- Traditional peak seasons shifting from summer to spring
- Croatia experiencing extended seasons (through October)

Key Challenges

- Overtourism concerns highest (especially Italy, Greece, Croatia)
- 80-90% of travelers stick to traditional highlights
- Pricing pressure due to increased demand
- Notable impact: Rome's 2025 Jubilee mentioned

Travel Style Evolution

- Single-destination trips increasing significantly (69.5% in 2025 vs 64.5% in 2024)
- For booked trips: 76.19% single-destination preference
- 10-30% of repeat travelers interested in off-the-beaten-path destinations
  - 52.9% of Travel Specialists in Europe report authentic cultural experiences as a priority
  - This percentage increases to 76.3% among those who successfully book trips to Europe, suggesting cultural authenticity is a key driver of booking conversion

Demographic Differences in Interests

Among Previously Booked Zicasso Travelers

Top Interests for a Europe Trip

- Cultural authenticity emphasis (76.3%)
- Strong correlation between authentic experiences and pop culture experiences (83% overlap)
- Cultural immersion/expert access (64.1%)

Among Previously Matched Zicasso Travelers

Top Interests for a Europe Trip

- High-end accommodations (62%)
- Personalized service (58%)
- Unique experiences (54%)

Booking Behavior

- Italy: March-April emerging as new shoulder season
  - Italy: October is now high season, shifting from traditional shoulder
- Greece: October shifting to shoulder season
  - Previously early October only
  - March/April becoming more popular, earlier starts
- Portugal: Early October noted as high season
  - Traditional season starts earlier
- Spain: October remains one of the most demanded months
  - March noted as shoulder season
- Movement away from peak summer months (particularly July-August)

This analysis of growing destinations suggests travelers are gravitating toward destinations that offer more flexible seasonal options, particularly in spring and fall periods, which aligns with the broader trend of spring months increasing (41.6% of trips) noted in the overall data.

The strong growth in Mediterranean destinations, particularly Italy and Greece, combined with the move toward spring travel, suggests a strategic response to overtourism concerns. The significant success rate difference between early and late bookers (about 74 days) indicates that 2025 will likely see even earlier booking patterns as travelers compete for premium experiences in preferred shoulder seasons. The data also indicates a clear shift toward concentrated, single-destination European travel, with travelers choosing depth over breadth.

Latin America

Top 5 Most Requested Countries in Latin America

1. Arenal, Costa Rica
2. Manuel Antonio, Costa Rica
3. Monteverde, Costa Rica
4. Machu Picchu, Peru
5. Galápagos Islands, Ecuador

Key Observations

- Value proposition emphasized
- Natural wonder focus
- Less overtourism concerns
- Weather pattern changes affecting seasonality
- Currency advantages highlighted
- Strong emphasis on cultural authenticity

Cost & Booking Patterns

- Cost concerns cited by 62.5% of respondents
- 63.1% increase in family travel interest
- 21.0% increase in younger travelers and solo travelers
- 15.8% consistent demand for couples

Common Trends & Travel Interests

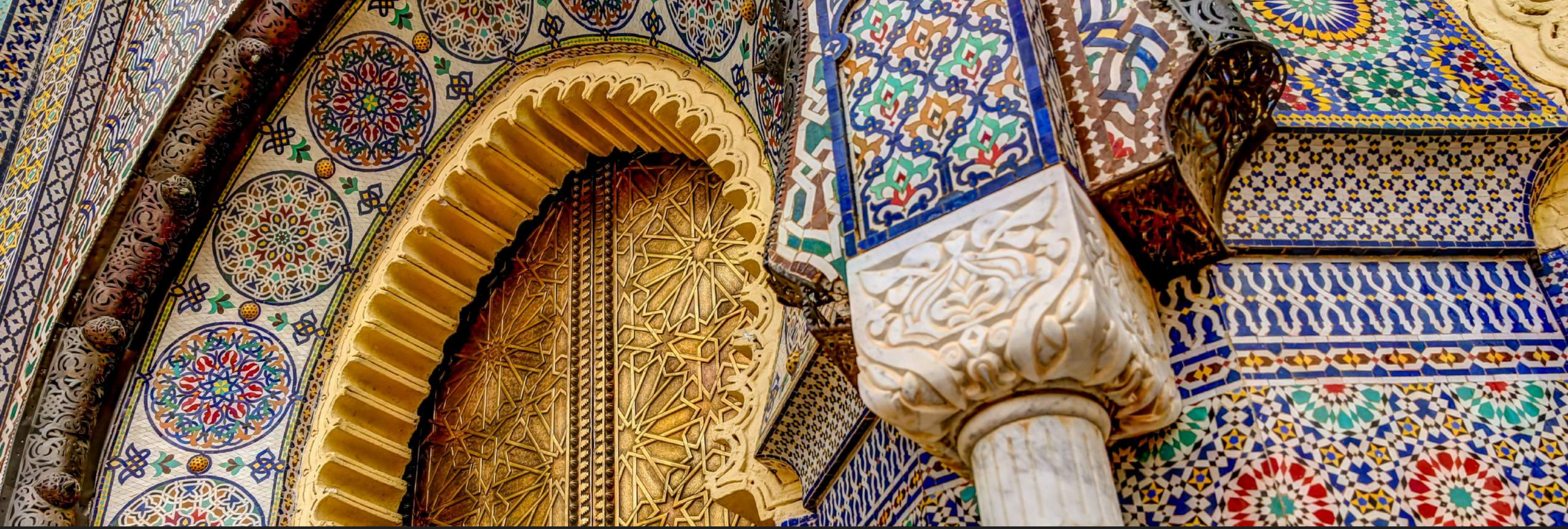
Costa Rica seeing increased demand in traditionally slower months (September-October) with the most popular destinations within the country according to local travel specialists remaining:

- Arenal
- Monteverde
- Manuel Antonio

Latin America's 2025 travel landscape demonstrates a significant shift in traditional tourism patterns. The strong surge in family travel (63.1% increase), combined with growing interest from younger and solo travelers (21% increase), showcases a destination evolving beyond its established market segments.

The high correlation between natural wonders and cultural authenticity, particularly in Costa Rica's emerging shoulder season popularity, suggests sophisticated travelers seeking year-round experiences beyond peak periods. This evolution, alongside the region's strong value proposition and reduced overtourism concerns, points to a destination where natural immersion and authentic experiences drive travel decisions more than traditional cost considerations.

Middle East/North Africa



Top 5 Most Requested Destinations in the Middle East/North Africa

1. Marrakech, Morocco
2. Cairo, Egypt
3. Essaouira, Morocco
4. Sahara Desert, Morocco
5. Atlas Mountains, Morocco

Key Trends

- Safety messaging important
- Cultural immersion emphasis
- Luxury desert experiences popular

Seasonal Patterns

- 66.6% report prolonged high season
- 33.3% note greater year-round demand

Key Activities/Interests

- Cultural and historical experiences, including:
  - Private guided tours to Giza Pyramids
  - Entry inside Great Pyramid
- Culinary/Food Related:
  - Cookery classes at farms
  - Food tours with local culinary focus
- Sailing experiences:
  - Nile cruises (Luxor to Aswan route specifically)

Impact Factors

- External events affecting travel patterns
- Impact of earthquakes and conflicts noted
    - Impact of current geopolitical situation on bookings

The Middle East and North Africa's 2025 travel landscape reflects a nuanced transformation in luxury travel preferences. The strong emphasis on cultural immersion, particularly evident in Morocco's dominance of top destinations, coupled with the rise in luxury desert experiences, indicates a market successfully balancing authentic experiences with high-end comfort.

The significant shift toward year-round travel (66.6% reporting extended seasons), combined with the growing popularity of culinary experiences and historical immersion, shows that sophisticated travelers are seeking deeper cultural connections.

Despite regional challenges, this development points to a destination where cultural authenticity and exclusive experiences drive travel decisions more than traditional safety concerns.

South Pacific

Top 5 Most Requested Destinations in the South Pacific

1. Queenstown, New Zealand
2. Abel Tasman National Park, New Zealand
3. Great Barrier Reef, Australia
4. Fiordland National Park, New Zealand
5. Rotorua, New Zealand

Booking Patterns

- 90% of first-time visitors follow usual highlights
- Multiple partners emphasize "book early" messaging, particularly for boutique properties
  - Limited luxury accommodation availability is consistently mentioned by 85% of regional partners

Seasonality Changes

Shoulder Season Evolution

- Spring (Sep-Nov) and Autumn (Mar-Apr)
- Notable shift: September bookings increased significantly in 2024
- 75% of arrivals still occur during summer months despite attempts to promote shoulder season

Unexpected Finding

- Nature/wildlife-focused trips average longer stays
  - Active adventures in fjords and glaciers
  - Hiking/trekking experiences
  - Native tree planting experiences
- Cultural immersion experiences show higher satisfaction rates
  - Aboriginal cultural experiences
  - Māori cultural immersion
  - Local farm/vineyard visits
- Adventure activities often combined with luxury accommodations
  - Multi-night boutique stays
  - Remote luxury lodges
  - Private villas
  - Exclusive location access

Destination Trends

- New Zealand Rankings:
  - Maintains a high conversion rate: ranked #3 in sold trips for 2025
- Australia Performance:
  - Improved from #7 in 2024 to #5 in 2025 in popularity
  - Ranked #4 in sold trips for 2025

The conversion rate for Oceania destinations is notably higher than other regions. While New Zealand saw a 27.4% decrease in total trip requests, it maintained a top 3 position in actual bookings, suggesting more serious intent from inquirers for long-haul destinations.

2025 Travel Trends Conclusion

- Spring shoulder season dominates 2025 bookings with 49.3% of travelers choosing March-May, particularly in Europe and Latin America, demonstrating a clear shift away from peak summer travel
- Luxury travelers increasingly prioritize in-depth, single-destination experiences, with 76.2% of successful bookings focused on one country, emphasizing cultural authenticity and local immersion
- Early planning emerges as crucial, with an average 188-day booking window reflecting the complexity of crafting personalized luxury experiences that meet evolving traveler expectations

Zicasso's 2025 Travel Trends Report reveals a transformative year in luxury travel, marked by strategic timing preferences and deeper destination engagement. The unprecedented shift toward spring travel, particularly evident in Mediterranean destinations, signals a fundamental change in how discerning travelers approach their journeys, prioritizing experience quality over traditional seasonal patterns.

The report highlights a notable evolution in luxury travel preferences, with cultural authenticity driving 76.3% of booking conversions. This trend manifests across regions, from private sake tastings in Japan to spice route explorations in Morocco, demonstrating travelers' growing sophistication in seeking experiences that transcend traditional luxury parameters.

The diversity of travelers spans all age demographics, with the strongest conversion rates among those 51 and older, while maintaining strong appeal across generational groups. This broad appeal, combined with the trend toward single-destination immersion, presents both opportunities and challenges in crafting deeply personalized experiences that satisfy increasingly sophisticated expectations.

As the luxury travel landscape continues to evolve, Zicasso maintains its leadership position by anticipating and adapting to these emerging patterns, ensuring each journey reflects the perfect balance of exclusivity, authenticity, and personalization that defines modern luxury travel.