



TRAVEL TRENDS

*FROM THE
FRONTLINE*

Q3, 2025:

What's Going On?

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EMBARK BEYOND

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2025 Third Quarter Trends Report:

What's Going On?

The question everyone seems to be asking us: What's going on?

We said before it's like a raging party has moved to a mellow dinner gathering. The thing is, our favorite kind of party is still raging in some places—think festive lunches on the French Riviera. But overall, it's more a well-curated gathering with a tighter guest list. And yes, it's a rollercoaster of uncertainty.

We've just entered the third quarter of 2025, which has historically been our most lucrative for luxury travel. The year is still strong with incredible growth, but markets are going wild, inflation continues, the market seems to be a chameleon, there is tariff mania, and geopolitical uncertainty, plus we are still dealing with exorbitant pricing, overtourism in certain markets, and intense heat. There's a more recent term for this kind of economic whiplash, where the data says one thing, but the mood on the ground feels very different. It's been dubbed a "vibecession" by author Kyla Scanlon—a reminder that perception and sentiment can carry as much weight as actual numbers.

No wonder we're all riding a precarious line between boom and burnout.

While our UHNW clients can certainly afford to travel, they're increasingly focused on value—value for money, for time, and for experience. With inflation up 20 to 30%, the squeeze is hitting the aspirational HNW traveler hard. That opening tier of the luxury market is under pressure. Luxury goods are down (even Starbucks is down) and travel across the globe is beginning to feel the weight.

So, for all those working on 2026 budgets, we recommend holding firm against anyone pushing to match the unsustainable RevPAR and growth of the past three years. All signs point to a year that resembles 2019 (an incredible year) when it comes to occupancy and demand, with a forecasted 30% increase in ADR over 2019 levels.

In this segment of the Embark "From the Front Lines" Trends Report, we focus on the following:

1. Half-year outlook and overall summary of market pace and performance
2. Top 5 luxury travel trends, and how travel behavior is shifting
3. The 5 Biggest Global Issues That Will Affect Us Next Year
4. Distribution observations – This is important!
5. Top 10 Opportunities - Yes, it's an exciting time!

While reviewing what follows, keep in mind our view of the marketplace is highly specific. Embark caters to a very slim UHNW audience, with a core client age of 30–55 and an average spend of just over \$3,800 per night. While we have advisors across six continents, 70% of our business remains American. We're a relatively small but mighty \$300 million company, soon celebrating our 6th anniversary.

As always, we welcome your feedback and insight. Let us know what you'd like to see tracked in future reports. We'll watch and report back. Feel free to reach out at jack@embarkbeyond.com with any questions, thoughts, or press inquiries. We look forward to hearing from you.

~ Jack Ezon

Embark's 2025 Third Quarter Trends Report:

Pace: As noted above, we are seeing a slight slowdown in transient pace, but nothing alarming. While revenue for Embark Beyond is up by 31% YTD, per-advisor growth is only up 4%.

Booking Windows Continue to Shrink. Consider this:

- **Long-haul trips** (flights longer than 10 hours): booking window shrank from 57 days to 49 days.
- **Medium-haul trips** (flights between 5–10 hours): booking window shrank from 47 days to 29 days, with Med bookings hovering at 22 days.
- **Mediterranean:** Mediterranean booking windows, specifically, shrank from an average of 42 days to 35 days, with 50% of bookings made in under an average of 2 weeks.
- **Short-haul trips** (flights under 5 hours): booking window stayed steady with an average of 17 days.
- **Festive:** Festive is a whopping 40% behind pace; the first week in Festive is a bit soft on pace like last year due to how the holiday falls, but strong going into New Year's week. For the Caribbean, we have a slow pace for Festive; we see more in Mexico, which continues to see a normalization. We saw this same trend last year, though. People kept pushing back on rate and minimum stay and waited for things to soften at the last minute. In 2024, we closed almost 30% of our Festive business after November.

Quick anecdotes that tell the story of luxury travel now

Business is up but demand is clearly waning. Consider these illustrations:

- Peak season is shorter than ever. Summer peak season really compressed into the last 3 weeks of July. Before and after, space was relatively easy to access in often untouchable destinations. People are still traveling, but that peak business is spilling into September and June.
- Peak August dates in the untouchable Amalfi Coast and St. Tropez have open space and lower rates than July.
- There remains space in Mykonos (and many islands in Greece) any day this summer, even in July.
- St. Bart's has prime options over Festive. Botswana is wide open in peak season.
- Miami has plenty of space over F1 and Art Basel.
- Autumn outlook in U.S. cities like NY, which are usually the busiest, is a lot softer, suffering from a lack of compression. American and Canadian cities are suffering occupancy this summer.

It's High. Not Medium and not Low

How is our business up if the world seems soft? Let's put this into perspective. First, we are adding new advisors, so growth is internal, not external. However, what's important to see is that the wealthy are still spending when they need to. It is the peak-peak-peak dates in July that are full at full price. The peak-peak dates of Festive will sell too. But outside of that—even in peak season—the notch-below clients are the ones driving demand down. This is pretty consistent with the rest of the world of luxury. High jewelry is catapulting, while silver and leather (Hermès aside) are suffering.

Longer Seasons, Lower Compression

The other factor is that, outside the peak weeks, longer seasons due to climate change are relieving compression, which reduces demand for top rates. It throws companies into a panic when their peak season shortens from months to weeks, though we fathom that the revenue at the end of the year is close to the same since it is spread out over time. The big issue is that compression allows for higher rates, which is not the case this year.

REGIONAL REFLECTIONS

A. Africa

- Embark Safaris has seen a spectacular year of growth, up 91%.
- However, looking at Q4 in 2025 vs. previous years, the booking pace has slightly slowed down by about 5%.
- Botswana is down about 18% in peak season, which seems to be a pattern in the market, as exorbitant rates—at almost US\$10,000 a night—seem to be shifting market share to other destinations.

B. Europe

- **Summer City Slowdown:** European cities performed exceptionally well in the first two quarters of 2025, up about 16% from 2024 in gross bookings (revenue). However, summer saw a decline in revenue in iconic cities with the exception of Paris.
- **The Paris Factor:** Paris seems to be unstoppable. Growth in transactions and revenue continues to grow at a stunning pace. It is the city du jour with a 21% growth in revenue as a destination from 2024 (noting many people stayed away last year due to the Olympics and filled spring months because of Swifties).
- **London Continues to Slump:** It's a perfect storm for London. Excess (new) luxury supply, weakened corporate demand, and the elimination of VAT—which decimated foreign annual shopping escapades—have created a softer market for London. Unlike Paris, which continues to grow its vibrant F&B and exhibition scene, London seems to be, well, just there. Wimbledon was even weaker by 21%. For the first time ever, we sold more Roland Garros than Wimbledon.
- **Expanded Seasons:** Looking at Europe for the year, we see business up 41% from 2024. ADR remained steady, down just 2%. June and September now surpass August and even July in certain regions, especially in the Med. August has become the new opportunity month. March, April, November, and December are our biggest growth months on the continent.
- **Our Number One Destination for the Past Summer Season?** The French Riviera led the way as our number one destination—both in revenue and room nights—for the 2025 summer season, led by St. Tropez. For the first time, it exceeded the Amalfi Coast, albeit by just 3.5%. Monte Carlo and Cannes were the biggest spillover beneficiaries of the magnetic Pampelonne.
- **Italia Triumph?** Despite growing by 4%, Italy remained our number two destination for the season for the second year in a row. Historically, it has always been number one. Period. Stop.

For both 2024 and 2025, it got slighted by France for the first time ever. Pushback on rates has shifted business to the South of France (St. Tropez grew 26%, while the Côte d'Azur in general grew 21%) and more value destinations like Portugal stole share, growing 28%.

- **Greece in Decline:** Despite a continued push highlighting its value proposition, this summer saw a 4% decline in business to Greece, which was already down in 2024 compared to 2023. Without our marketing efforts we believe it would have been down nearly 20%. Business on the books looks much weaker going into the season, but compression and rate in Italy and France drove value seekers to Greece. Indeed, 2025 was the first year since the pandemic that rates in Greece became a “value” (relative to Italy and France).
- **USA:** Domestic travel within the USA continues to decline, with Embark seeing a loss of 4% over 2024, which was already a weak year. Rates are still not aligned with demand. Florida has taken the hardest hit here in the U.S., followed by Midwest and Western resorts. Los Angeles and New York were the hardest hit cities, especially since they lost their significant share of international travelers. From our vantage point, though, rates are down about 15% across the USA. Despite this, customer feedback is very clear and consistent: for the rates still being charged domestically, clients can visit a new destination or another culture, including European hotspots. The saving grace was Americans hesitant to leave the country due to the intense war in Israel and beyond, coupled with the notion that they will not be welcomed due to political strife. This group filled the vacancy left open by the dearth of incoming business, as many foreigners are boycotting the USA this year (especially Canadians and Chinese).
- **Asia:** Asia grew about 18% in 2025. Its no surprise that Japan and *White-Lotus* Thailand led the way, owning the most significant share. The rest of SE Asia? Flat over 2023; with China continuing to slump.. Lack of lift or decently priced lift continues to inhibit growth. Japan has flattened out with just 3% growth in 2025, with many afraid of overtourism and inflated prices (despite the weakened yen). Thailand has predictably grown 21%.
- **Cruise:** Business continues to increase as it presents amazing value. With any good yacht hovering close to \$450,000 and nightly land rates (with nothing included) averaging \$3,500 a night in key destinations, a cruise suddenly seems like a good consideration.

Top 5 Travel Trends

How we see people traveling differently this year

- 1. It's Still About Joy. Think Med Travel + Beach Clubs in July :** People just want to have fun, and yes, that means a beach club or a festive restaurant. They are flocking more than ever to festive destinations: from St. Barts to St. Tropez, Sardinia to St. Moritz, Courchevel to Bodrum. And many destinations are taking advantage of this trend stocking up on 'festive' imports From ski resorts like Val d'Isère to mega destinations like Dubai – many see this high-stakes, high-revenue potential of the current craze. What's it all about your ask? You see, war, tariffs, and political quagmire are stressing people out. People are lonely and looking to be in fun, communal environments with like-minded (and similarly situated) to escape the endless geopolitical coverage (both the reality of the world and the inflated fury) on social media. This also reflects the growth in private clubs and other high-barrier-to-entry (i.e. high priced) gathering spots.
- 2. Passion-Driven Travel:** It's not about where, but why. More and more, people are asking to go somewhere for a purpose: great padel, great windsurfing, great shopping. The focus is shifting from the destination to the reason for going. That's why Embark has partnered with Windstar for a host of passion driven experience trips, starting with Mahjong (the hottest craze amongst – gasp – 20-somethings), Padel, En Plein Air painting experiences and more. Shopping is leading the way and we are up 44 percent on trips centered around shopping, from fashion to jewelry to watches. Keep a focus on micro-passions. Go deep and long with them. They breed cultish following.
- 3. Events and Exhibitions as Anchors:** In line with passion-driven travel, events and exhibitions are driving business like never before. Some key examples that drove significant demand in 2025:
 - Dolce & Gabbana and Armani couture shows
 - Salone del Mobile in Milan
 - David Hockney exhibitions
 - Beyoncé's global tour
 - Formula 1 all over the world
 - Art Frieze (London and New York)
 - Art Basel (Miami and now Paris)
 - FIFA/soccer matches
- 4. Together or Alone? Connecting with Friends:** This trend is continuing, up 27 percent from last year. People want to be together. No one is traveling as a single couple anymore, it's now three couples, or a group of eight friends. We previously covered this from a wedding angle, saying people are doing more "group-moons" than ever before. Affinity group travel is growing—people are traveling around shared passions, from mahjong to meditation. Moms are also leaving their families to travel alone or with friends for personal time, or "me-time"—one of the best gifts you can give a mother.
- 5. Solo Travel:** While group travel is growing, we are also seeing an 11 percent increase in solo travel. We do see this mostly for women, who are choosing to go alone for reflection, independence, or a reset, but also for men.

The 5 Biggest Global Issues That Will Affect Us Next Year

1. **AI** – As technology quickly progresses, it will disrupt everything from communication, design, planning, pricing, customer engagement, and delivery.
2. **The Economy** – A soaring market that is now unreasonably climbing, stubborn inflation, high interest rates, and erratic currency fluctuation will affect the travel business significantly. The weak US dollar is great for demand outside the USA and countries whose currencies are pegged to the dollar (like much of the GCC), but not good for markets going to those countries.
3. **Tariffs and foreign relations** – Relations between countries are strained and this truly impacts the comfort levels people have while traveling.
4. **War and unpredictability** – Israel, Taiwan, Ukraine...we don't know what's next.
5. **Safety while Traveling** – How safe people feel traveling: safety concerns around airplane maintenance, Air Traffic Control centers, and high crime in certain cities like L.A., NYC, and San Francisco.

Distribution Observations

Why this matters: Each third quarter we look at technology and distribution observations that we see. Yes, it may seem boring, but it is just as relevant as forces affecting the luxury marketplace and beyond. Technologies—and yes, that includes the buzzword *du jour*, A.I., will shape our industry more than ever before. The travel space is plagued with antiquated, clunky technology and outdated CMR platforms. New platforms will alter the way things are priced, the way people pay and the way product is distributed. The two-decade notion of SEO and the titanic OTA channels are all ripe for a reset while human distribution (i.e. the Embark channel) will witness a seismic displacement.

1. **AI:** There is no question that the two letters on everyone's lips this year have been "AI." The rapidly evolving technology puts into question everything we do in every walk of life. It is one of the most frightening and one of the most exciting times to be in the hospitality business—and no, the ultra-luxury space will not be spared. Leading luxury brands like Four Seasons use AI to analyze past stays and social media activity to customize room amenities and dining recommendations, while Louis Vuitton creates personalized shopping experiences using predictive analytics, marking a pivotal shift where human intuition meets machine intelligence to deliver never-before-seen personalized luxury experiences.

The **Embark Blackbook** will serve up proactive client suggestions and enable advisors to better cross-sell, up-sell, and select the right products for each specific client, fusing a client profile with a product profile and Embark's agent's past input. Consider some of the incredible technology already available or soon to be available. Some may balk that it makes mistakes (it does) but remember, we are still in the dark ages of AI, and it is accelerating like no other technology in the past. It is something we must all embrace and learn from daily.

Here are some of the AI-driven applications already reshaping how we work:

- **Hyper-Personalization Through Predictive Analytics:** AI enables real-time customization of itineraries, offers, and content based on user behavior and preferences, critical in the HNW space. Technology can now generate a five-day bespoke itinerary before a human even picks up the phone. It can dynamically swap content based on a user profile. Luxury brands like Hermès use this tech to track and personalize client experiences across global locations, ensuring consistency from Paris to Tokyo to New York.

- **Back-End Optimization and Operational Intelligence:** AI is streamlining rate parity, availability mapping, and client profiling across B2B channels with unprecedented accuracy, helping luxury agencies and hotel partners optimize operations.

- **Trip Diagnostics:** Tools are emerging that reduce human error through digital checklists, trip diagnostics, and itinerary creation from scattered confirmations and correspondence. Luxury properties are also using AI to analyze booking patterns and competitor pricing in real time. Delta, for example, now offers variable pricing based on the specific user interacting with its platform. (Is that discrimination?)

- **Inventory Management:** AI-driven systems help luxury retailers forecast demand for limited-edition items and manage global inventory to avoid stockouts while maintaining scarcity.

- **AI Agents and Digital Concierges:** Sophisticated AI concierges are transforming discovery and planning through messaging platforms and luxury-specific voice assistants. These systems manage complex tasks like aligning private jet schedules with restaurant bookings and cultural events across time zones. Mandarin Oriental's AI chat, for instance, arranges helicopter transfers and private museum tours, learning from each interaction to match traditional concierge standards.

- **Generative AI and Future Innovation:** Generative AI (originally seen in tools like DALL-E 2 and Google's Imagen Video) now powers systems that create personalized travel recommendations by analyzing a client's preferences and history. It's redefining how luxury experiences are imagined and delivered.

2. **OTAs:** It's not just brick-and-mortar agencies facing reinvention. Online Travel Agencies (OTA's) are being disrupted as AI and conversational tech reshape luxury travel. Travelers now prefer AI-powered planning tools over traditional OTA portals. OTAs wrestle with identity crises, rising marketing costs, and ad fatigue. AI threatens to bypass them entirely, pressuring OTAs to become trusted super-apps. Meanwhile, algorithmic bottlenecks push luxury brands to gatekeep exclusive offers for select partners.

3. **SuperApp Maturation:** With Chat Operator already able to plan an entire vacation and Asian platforms like WeChat, Grab, and Careem bypassing traditional distribution entirely, travelers are adapting. A Chinese UHNW client can use WeChat to book Peninsula Tokyo suites, hire guides, reserve Michelin restaurants, and order Dior spa services. This is all within one app, never touching DMCs or advisors. Indian and Southeast Asian OTAs like Cleartrip are building super-apps combining flights, hotels, ride-hailing, fintech, and payments.

4. **AI Aggregators and Travel GPTs:** AI tools like Layla, Tripnotes, and Google Gemini auto-generate full itineraries, risking advisor disintermediation. These platforms replicate OTA search and booking functions while offering intuitive conversational interfaces. Google's Gemini AI will soon power trip planning using email confirmations, Maps behavior, and search history, creating predictive itineraries before travelers even decide to go. Viral TikTok video of a hidden Aman-like glamping resort in Bhutan sells out in 48 hours, booked directly via a link in bio. Advisors weren't even aware the property existed. Dior's direct-to-friends social media promotion of its new Jonathan Anderson line put outsiders in a frenzy of FOMO.
 - **Impact:** Discovery is happening on social-first channels. Advisors must either follow these trends closely or risk clients discovering (and booking) on their own.

5. **The Ever-Changing Lifeline of Content:** Content creation will see another massive shift, not just because of the incredible new AI writing tools, but also because of the way people find things and the articles publishers want to publish to be found. This sway is occurring despite the growing number of "closed content" resources like Substack.
 - **Content will be all about the brand:** With so much fake news and generated content, a trusted brand will be key to survival in journalism. Reliable legacy names like *The Wall Street Journal* and *The New York Times* can (we think will) play a key role in validating information—though "reliable" still depends on who you ask.
 - **Devaluation of Online Reviews:** Along with the lack of trust comes a lack of reliance on online reviews. AI-generated reviews flood platforms today. TripAdvisor, Google, and even Airbnb are now flooded with synthetic or paid reviews, making them less trustworthy. TripAdvisor reviews for a luxury camp in Namibia are glowing—but AI detection tools later reveal that over 40 percent were written by bots or paid copywriters. Meanwhile, an advisor's firsthand report or insider WhatsApp photo becomes far more valuable to a client.
 - **Trust moves away from the masses and back to verified humans.** Advisors with real insights or vetted community knowledge gain power again—if they amplify it well.
 - **Creative Content Generation and Immersive Storytelling:** Luxury brands and advisors are using generative AI platforms like Sora and Midjourney for aspirational storytelling and immersive proposals. Embark Beyond is already creating cinematic presentations with AI-generated visuals of private villas and custom yachts tailored to individual preferences. Brands like Chanel use AI to generate campaign imagery that reflects diverse demographics while maintaining an aspirational edge, enabling rapid prototyping and personalized product visualizations. AI also supports on-brand social media, customized marketing materials, and automated content across platforms, all while meeting luxury's high standards. It builds predictive models for proactive service, enhances marketing performance, and delivers exclusivity at scale. Soon, Embark Blackbook will let advisors design alternative destinations and experiences driven by each client's unique motivations.

6. **Influencer-travel collabs:** Increasingly, creators are launching micro-trips or experiences, bypassing traditional distribution completely. Luxury agencies need to either own the creative layer or risk becoming invisible.

7. **The Future of SEO:**

The game of search optimization is being completely rewritten. Gone are the days of chasing algorithms and buying keywords. Plain-chat information gathering is quickly becoming the

norm. Tomorrow, the focus shifts to GEO ("generative-engine optimization"), also known as answer-engine optimization.

Some relevant stats:

- From April 2024 to March 2025, AI chatbot traffic surged by approximately 81%, from 30.5B to 55.2B visits. In contrast, traditional search declined just 0.51% year-over-year, totaling 1.86 trillion visits. Chatbots still account for only about 2.96% of total search traffic—a 34× gap.
- Daily averages (March 2025): search engines ~5.5B visits/day vs. AI chatbots ~233M visits/day (a 24 to 1 ratio).
- In a May 2025 US survey, 62% of respondents used an AI chatbot daily, and 51% plan to increase usage. 49% believe chatbots will eventually replace search engines.
- 72% of users engage with Google's AI Overview summaries when available—even frequent searchers.
- In the US, as of June 2025, AI tools captured approximately 5.6% of desktop search traffic—more than double the 2.8% from a year earlier.

Impact:

The entire approach to writing articles, titles, descriptions, and content is shifting. Instead of being found, content now needs to be cited (or recognized as a trusted source). The old SEO model of driving traffic through clicks and links will no longer deliver results. Instead, chatbots will summarize content and may provide a citation link—if you're lucky. You're no longer writing content to rank, you're writing content to be referenced by AI systems.

8. **Embedded Payments & Fintech in Travel:** Fintech may soon transform the outdated, inefficient payment systems in the travel trade. Startups and legacy players are racing to fix commission structures that still burden agencies. At the same time, luxury agencies risk losing ground if they don't offer seamless, modern payment options or instant bookability—especially as younger HNW clients expect fintech-level experiences. Consider:

- Tools like Sion, Trip Suite, Hopper Cloud, Uplift, and Rebank offer flexible commission models (like instant payouts, buy-now-pay-later) to boost advisor adoption. Meanwhile, American Express and others are embedding real-time travel perks and planning tools into banking apps, competing for control of the travel journey.
- High-end advisors and DMCs are adopting Stripe/Paystack/WeTravel hybrids to automate complex, multi-currency, multi-partner payments—and offer installment options to clients.

9. **To influence or not to influence, that is the question:** In a world of luxury, social media seems to be creating desirability and FOMO—and in travel, a desire to Instagram the same image others have. It's a "me too" movement that has overwhelmed certain destinations to the point of near destruction. To be real luxury, many clients are looking for the un-Instagrammed, Instagrammable locale. They want a spectacular place that people have not heard about or that isn't overrun. They want a place that still has exclusivity, or is a bit under the radar, while still being sophisticated, chic, and elevated. It's why several top clubs and other places are starting to prohibit mobile phones or cameras for the ultimate "if you know, you know."

10. Privacy, Identity & Hyper-Targeting:

With data powering AI, companies are rethinking their data strategies as information becomes more valuable than ever. Expect stricter privacy regulations (à la GDPR) as personal data becomes increasingly protected. Luxury brands are moving from reactive hospitality to anticipatory care. Advisors who don't collect—and own—client preference data risk falling behind.

- **End of third-party cookies:** Restrictions in regions like Europe are disrupting retargeting, audience building, and email acquisition.
- **Luxury brands turning to zero-party data:** The focus is shifting to consent-based data via quiz funnels, app onboarding, private events, and curated experiences—crucial for personalization.
- **Geo-fencing and behavior tracking:** Hotels and travel brands use beacon tech and AI (including scent and music response) to enhance on-property experiences and upsell post-stay.

For example: Aman's app offers wellness tips and exclusive content while collecting zero-party data (goals, triggers, preferences) used to personalize each stay—with custom oils, yoga sessions, and more.

Top 10 Opportunities

Hospitality always sits in one of the most fragile and sensitive spaces in business. This time is no different. The evolution of the internet in the late 1990s decimated over 65% of the retail travel industry and changed the way companies distributed information, connected directly to clients, and built revenue models forever. The accelerated maturation of AI will be no different.

The good news is that in every Darwinian shift, there is tremendous opportunity for those who embrace new environments and elevate their core offering. The way people find us, the way people consume information about us, the channels in which people buy, engage, and learn is shifting in a daunting and exciting way.

Yes, we said exciting!

- 1) Invest in Customer-Centric Platforms:** While AI and other new technologies will create process efficiencies, we believe the most important investment now is on the consumer side. While technology is revolutionary, to be successful, companies must create products with customer needs or lifestyle enhancement at the core. Experimentation is good. Strategic experimentation with a human-centric lens is better. Invest in platforms that will help you connect to your client better and truly tailor their interaction with you. What luxury means to someone in the oil industry in Oklahoma City is different from what it means to an investment banker in New York or an architect in Phoenix. There has never been a better time to understand your client better, to truly anticipate their needs and deliver sharper emotional impact. In this state of technological flux, prioritize consumer and product data over functionality. The rest will come. Develop a VIC program that eschews points or predictability and rewards with soul and mystique.
- 2) Be Proactive:** Indeed, the buzzword of luxury sales in 2025 is “Clienteling.” Interestingly, it is nothing new. It just has a fancy name. Proactive, relationship-based selling is as old as time and has always been a hallmark of remarkable salespeople. We’ve seemed to lose our way as business skyrocketed. Gone are the lines around the corner to buy that bag or the one-year waiting list to snag that table or room. It’s a humbling yet refreshing wake-up call. We all need to be proactive with our relationships and almost territorial about all stakeholders who keep us relevant. Don’t wait for the phone to ring. Reach out. Be proactive. Be human.
- 3) Leverage Emerging Trends:** Own emerging trends and connect to your clients deeper by showing them you understand them and can service their true needs. Small, self-created group travel, where friends or affinity groups travel almost like a multi-gen but not related, is the fastest-growing segment we see. This includes solo travelers meeting up with others, especially women. They travel for community and connection. What are you doing to engage this? Most resorts know how to deal with small individuals and large MICE groups. Anyone above 10 and below 50 falls through the cracks. What about building programming to fuse togetherness—whether for families or friends? What about experiences around cultural trends like padel, pickleball, painting or mahjong? They may not be seismic to your occupancy, but they will connect deeper with clients who share those passions.

- 4) **Sell the Why, Not the Where:** Reconstruct your messaging surrounding the “why” people should use you or visit you—not just where you are and your setting. Sell to people’s passions and use your product as a platform to engage or explore passions. People are traveling for passion today—whether it is F1, painting, staying active, or art. They leave their routine to go deeper into the things they love, explore new passions, and connect with people who want to build a community with others who share common interests. The other benefit is that “why” positions you around someone’s lifestyle, removing you from a “one-and-done” category. People can return over and over to a product that resonates with their lifestyle over a destination that checks a bucket-list box.
- 5) **Go Deep, Not Wide:** Go deep in niche communities rather than wide in broad messaging for true magnetism. While narrowing your target market might seem counterintuitive, it actually increases your brand's exposure to those who matter, clarifies your message, and positions you as an expert to your target audience. This elevated level of clarity will help you with creating new offers, website look, content, blogs, and social media posts to determine how to elevate your brand image and communication to this new persona.
- 6) **Something Old & Something New:** If you have something new or you want to introduce something new, consider pairing it with something tried and true for your clients. This reduces risk and nostalgic dissonance. Embrace comp set and complementary products; look for symbiotic relationships with tried and true destinations, properties, or other products, and insert yourself as a compliment, offering a bit of a change without risk. That may look like pairing your new resort with a mainstay like Paris, or if your client is hesitant to cruise, introducing them to a three-night add-on by river or even a one- to two-night train. Give them a taste of something new without them sacrificing the predictable love for something old.
- 7) **Position, Not Competition:** Create your own market. Rather than going head-to-head with your comp set, differentiate yourself from them. The stronger you can position your product, the easier it will be for you to find your client and overcome the noise. Be bold. Be proud of your position. Be clear about it. If you continue to be all things to all people, you will be nothing to no one. Strong positioning will help you supersede the saturated sea of content and increase your revenue by developing a truly cultish client base who shares your values and position.
- 8) **Reconsider Pricing Models & Value Proposition:** Transparency has never been more important. This is especially important for experience providers and tour operators whose model has already eroded with more transparent options on the internet. AI not only allows you to deconstruct itinerary pricing in seconds, but products like Google’s Gemini AI will soon power trip planning using email confirmations, Maps behavior, and search history, creating predictive itineraries before travelers decide to go. To maintain integrity, tour companies and travel advisors need to price more generic products more competitively and better articulate the value of more expensive, unique experiences. Indeed, value articulation is one of the biggest opportunities in the luxury travel space. Operators need to take a cue from luxury retailers in flaunting the value they offer both in their overall service and the specific experiences they sell for a high price tag.
- 9) **Invest in Corporate Culture:** If you are going to double down on the human business, double down on humans. The only way you will succeed is by developing incredible talent. That means a never-ending quest to breed love, breed emotional connection, and motivate people to step aside from

easy equilibrium to active engagement with pride. Training, motivating, and retaining talent will continue to be the stealth weapon for success in all hospitality companies.

10) Invest in Old School Relationships: As technology enhances distribution, pricing and logistic of planning, the only value humans will deliver is the power of their relationships. The power to get that sold out table, that room, or make the extraordinary happen. You can only do that with deep relationships, knowing the right people, and helping your client navigate a sea of information, validating what is truly accurate and what is truly right for them. Technology will never make someone feel special or help them enter as a VIP. Double down on what humans truly bring to the table. To do this, you need to develop a deep trust with your customer, showing them you understand their entire personal life so that they can trust you and look at you for human-vetted advice.

About Embark Beyond: Launched in 2019, Embark Beyond is the fastest-growing company in the luxury travel business, consisting of nearly 300 colleagues across the globe, with offices in New York and São Paulo. Known for innovative thinking rooted in traditional hospitality and a focus on relationships and fun, Embark is responsible for more than \$300 million+ in leisure travel sales and \$150 million+ in annual event sales. Embark Beyond is built on the Power of Partnership, collaborating with not only leading travel industry leaders but also fashion, home, and lifestyle brands—and investing heavily in training, marketing, and technology.

About Jack Ezon: Jack S. Ezon is Founder and Managing Partner at Embark, a luxury lifestyle partnership specializing in bespoke travel experiences. In his role Jack oversees the company’s direction, expansion plans, strategic partnerships, PR, and customer journey mapping while inspiring talent and business development.

Ezon is one of the most well connected and influential travel advisors in the world, known as a true innovator and outspoken leader in the global luxury travel business. His deep and broad relationships coupled with his global black book of clients and local purveyors had him dubbed the “*Olivia Pope of travel*” by Bloomberg in 2018. Lauded for his ability to deliver luxury travel experiences tailored to the next generation of travelers, he has attracted a core group of UHNW Generation-X and Millennial clients and built one of the America’s largest luxury social destination event businesses, partnering with an elite group of celebrity event planners to orchestrate incredible destination weddings, birthdays, and other celebrations around the world.

