ADVENTURE TRAVEL
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Work and Wander: Meet Today's Digital Nomads

March 2021

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ABOUT THIS REPORT

The COVID-19 pandemic has resulted in a global spike in remote work. However, most people known as "remote workers" have a home base such as a house or apartment, where they spend most of their time. They may travel and work from a different location for a few days or weeks, but then return to their home base. Digital nomads are different; they are a cross between the long-term expat and the two-week vacationer.

Although digital nomads may not be a traditional target market for adventure businesses, their very nature makes them adventure travelers. This group wants to truly experience a destination by staying for an extended period of time. Their ability to work from anywhere means they are also generating income while they travel. Therefore, attracting digital nomads is one way destinations, accommodations, and activities can support their recovery.

To gather responses from as many digital nomads as possible for this report, a convenience sampling method was used. The ATTA research team posted links to the survey in digital nomad groups on Facebook, through ATTA social media, in emails to partners and members, and via personal outreach. Participation was entirely voluntary and no incentives were offered. To qualify for the survey, respondents only had to identify as a digital nomad. Due to this sampling method, no generalizations can be made about all digital nomads, but we hope the data and recommendations reported in this overview assist readers to better understand this emerging market segment.

- Heather Kelly, Sr. Research Manager, ATTA

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KEY FINDINGS

1. Reliable internet is the #1 top must-have for destinations and accommodations, followed by good weather and a low cost of living.

2. Most digital nomads (who responded to ATTA's survey) freelance for multiple companies (36%) or own their own business (33%).

3. Being able to travel constantly and experiencing different cultures and meeting local people are the top reasons for living the digital nomad lifestyle.

4. 20% of respondents became digital nomads during 2020, likely as a result of COVID-19.

5. The top challenges faced by digital nomads are always being available and working too much, uncertainty, and loneliness.

6. On average, 36% of respondents' monthly earnings pay for lodging, food, and transportation; this revenue typically stays within a destination.

7. Respondents spend almost half as much on food as they do on lodging each month, showing cuisine as a priority.

8. Indonesia was the only country to be top-ranked for all lengths of stays.

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WHO ARE DIGITAL NOMADS?

Digital nomads are people who use telecommunications technologies to earn a living and, more generally, conduct their life in a nomadic manner. Such workers often work remotely from foreign countries, coffee shops, public libraries, co-working spaces, or recreational vehicles."[1] They often spend months at a time in one location, then move on to another. They may not have a permanent address, instead living minimally and traveling with many of their possessions.

Members of this group shop in local stores, eat at local restaurants, and stay in locally-owned accommodations, meaning more money is often kept within the local community and economy, rather than going to large international brands. In their travel interests, however, they're different than locals—they're curious about experiences with the attitude of a visitor, sharing their experiences with friends and family back home who haven't yet gotten up the nerve to make the dream of living in another culture a reality.

Digital nomads typically stay longer than leisure tourists in each destination as they are able to generate income as they travel. Some destinations are introducing visas specifically for digital nomads, allowing them to stay for extended periods of time and work remotely without the more stringent requirements of a work visa.

[1]https://en.wikipedia.org/wiki/Digital_nomad

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CURRENT DIGITAL NOMAD LANDSCAPE

As the concept of digital nomadism becomes increasingly popular as one way to respond to the COVID-19 crisis, various destinations are enacting programs to attract this group. Countries in the Caribbean and European Union (EU), in particular, are quickly joining the list of locations offering special visas and policies for digital nomads. While many tourist visas only allow for a short-term stay, a digital nomad/freelancer/self-employment visa is typically good for a year or longer.

Some destinations ask applicants to prove a minimum level of income, pay a visa or healthcare fee, or have a recent police background check completed. Additional health requirements may apply, such as a mandatory COVID-19 test and 48-hour quarantine, and proof of health and travel insurance. Some countries require long-term visitors to have work contracts within their borders, to ensure they are providing benefits to the local economy.

It is likely that more destinations will explore this way to attract travelers in the COVID recovery period and beyond. Accommodations, restaurants, shops and other service companies can also benefit from long-term guests that prefer to spend their money with local businesses. However, many of these organizations do not know where to start or what digital nomads are looking for; the research completed for the next section of this report seeks to answer some of those questions.

A DIGITAL NOMAD'S PERSPECTIVE

I was introduced to remote working when I joined the Adventure Travel Trade Association (ATTA) in 2017. The ATTA had been fully remote since 2012, but for me it was a totally different world. At first, I learned that the remote work life demands a lot of discipline and effort to stay productive, on track, and on task. It's easy to get lost working on non-urgent tasks at your home—doing laundry, watering the plants, cooking lunch—when you suddenly realize it's already 3 pm. It was a huge challenge for me, as it is for many people.

Soon enough I also learned that working remotely gave me much more freedom than I expected, especially location-wise. If I'm having an online meeting with a client in Japan, it doesn't matter whether I'm working from Brazil or France. As long as I am present and delivering what I am expected to, I can be wherever I want. And for me and many people like me, when the need for exploration calls, we can't stay still. We have to go!

So I started traveling to other destinations for short periods of time to test the waters. It didn't take long to realize that although my work routine was the same, in my free time I could really get to know a new and different destination. Each new trip I was discovering the unique offerings of different places, and the more I did, the more I wanted to keep going. I was able to travel slower and actually live in a place, becoming a regular at a local coffee shop or the beach that only people from the area know about. I learned local slang and the typical food that peoples' grandmas cook. I made new friends and learned about a place's culture in a way that made me feel much more connected to the world.

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A DIGITAL NOMAD'S PERSPECTIVE

Of course welcoming digital nomads to a destination has its pros and cons. The process involves implementing long-term work visas, coordinating taxes, and often an increased local cost of living. Some places are negatively impacted as residents can't afford to live in the area that is now popular with digital nomads. These are difficult matters that destinations and travelers need to be aware of and work toward a solution to minimize the harm.

On the bright side, I see a lot of benefits coming from this new type of traveler. Responsible travelers value enjoying new places while contributing in a positive manner. Negatively impacting a location in unsustainable or damaging ways is out of alignment with their values. While many places have a tourist bubble where only businesses in a certain spot benefit from general tourist spendings, digital nomads will leave their earnings in a more diverse area. From street markets to small, locally-owned businesses, digital nomads want to find and contribute to the "local life." They want a deeper experience, which means getting away from souvenir shops and Tripadvisor "Top 5" lists.

Understanding this lifestyle can be complex and many people and destinations are still unsure of what it means. The number of digital nomads was steadily increasing year-by-year, but COVID-19 drastically increased this market, catching many destinations, accommodations, local business, and tourism boards unprepared. I hope this report can be a starting point for many organizations that want to know more about who these travelers are, what they are looking for, and how to address their needs.

- Diego Arelano, Marketing Specialist (and lead Digital Nomad), ATTA
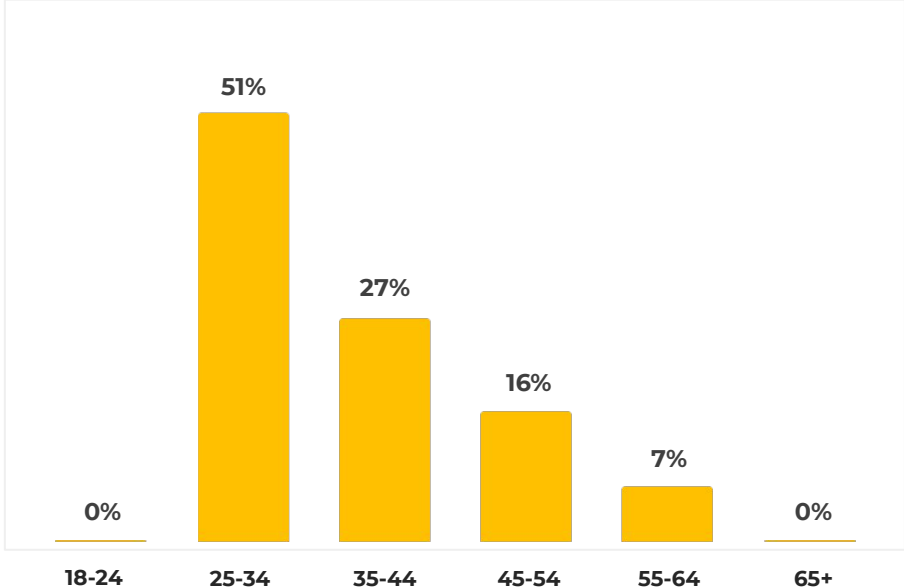
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PROFILE OF RESPONDENTS

DEMOGRAPHICS

Survey respondents who chose to answer three optional questions about demographics are primarily aged 25-34, female, and white.

51% — 25-34
27% — 35-44
16% — 45-54
7% — 55-64
0% — 18-24
0% — 65+

18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+

71% FEMALE

91% WHITE

Q33: What is your age?
Q34: What is your gender?
Q35: Please select which best describes the race or ethnicity you most identify as
Base: All respondents excluding those left blank (Q33 & Q34 n=45, Q35 n=34)
Source: 2021 Digital Nomads Survey

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ORIGIN

The majority of the survey respondents are from North America and Europe, although other regions of the world are represented.

38%

of respondents consider their current place of residence to be different from their home country (where they hold their primary passport).
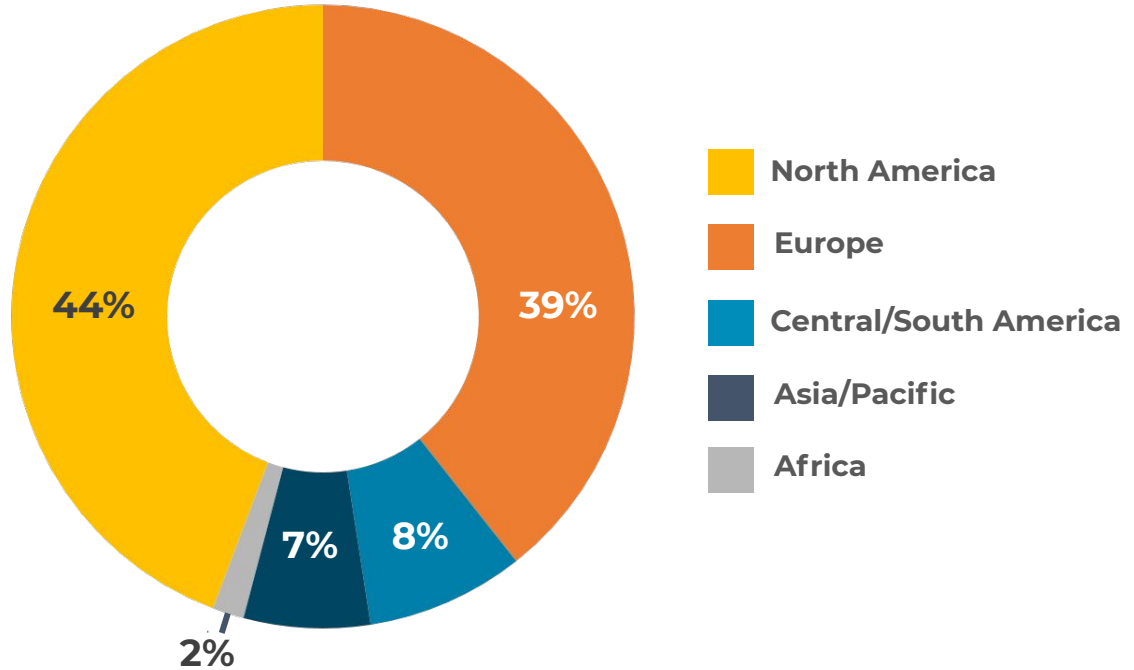
Legend:
- North America — 44%
- Europe — 39%
- Central/South America — 8%
- Asia/Pacific — 7%
- Africa — 2%

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COUNTRIES EXPERIENCED

Survey respondents have lived and worked in a range of countries. Digital nomad experience in three to four countries is most common, but many have lived in ten or more, and some are just getting started.
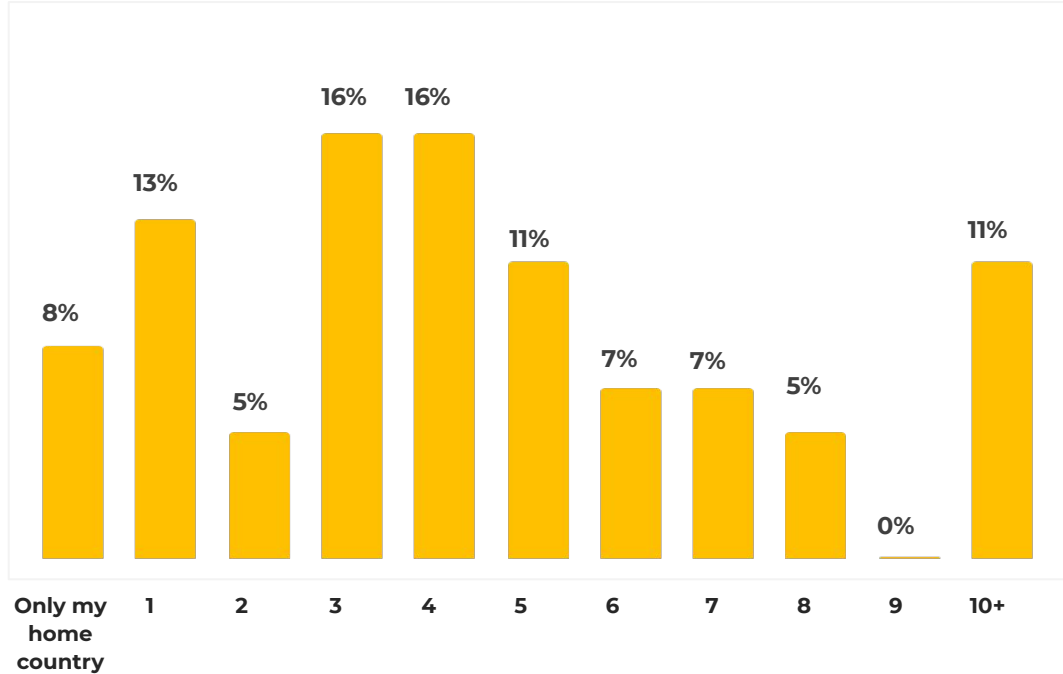
Category	Percentage
Only my home country	8%
1	13%
2	5%
3	16%
4	16%
5	11%
6	7%
7	7%
8	5%
9	0%
10+	11%

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EXPERIENCE DURATION

Many (41%) of the survey respondents have been living as a digital nomad for more than 5 years, but 20% became part of the trend in the year 2020.
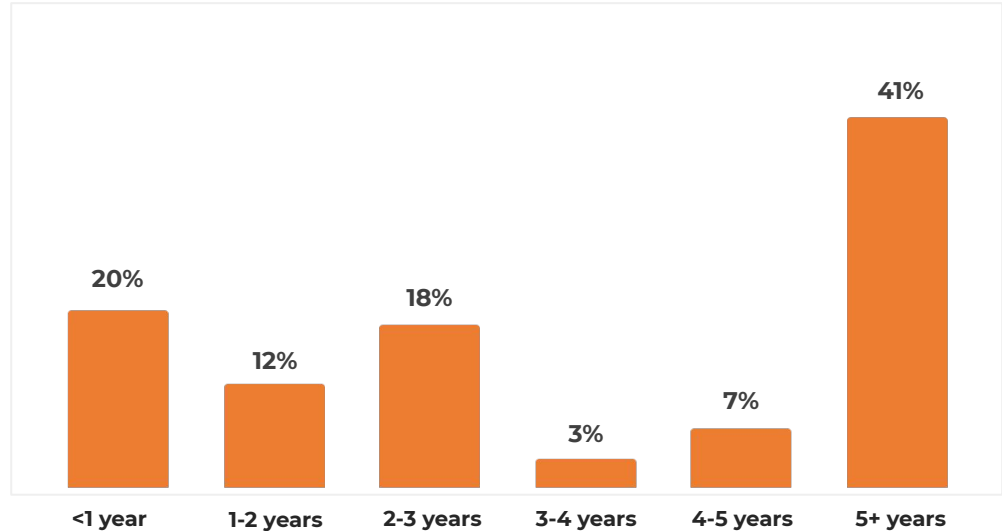
20%	12%	18%	3%	7%	41%
<1 year	1-2 years	2-3 years	3-4 years	4-5 years	5+ years

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PROFESSIONAL ROLE

36%

freelance for multiple companies

46

HOURS WORKED PER WEEK
(on average)

33%

own their own business

21%

work as a regular employee for one specific company

5%

work as a consultant for one specific company

3%

responded "other"

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PRIMARY PROFESSION

No one profession dominates this group. Of our respondents, 17% consider themselves writers, 14% work in digital marketing/social media, 8% are bloggers, and 7% are developers/programmers.

The rest encompass an array of roles: designer, virtual assistant, photographer/filmmaker, video editor, online language teacher, translator, podcaster, event and travel planner, recruiter, project manager, teacher/trainer, financial advisor, data analyst, and more.

87%

make all their income as a digital nomad

(the rest have savings or support from family members)

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INCOME

Respondents' average monthly income in $USD is*:

$4,500

*One outlying value was labeled and omitted from calculations using a 2.2 multiplier (Hoaglin & Iglewicz, 1987)

EXPENSES

of their income is spent locally

36%

$1,000

average spent on housing per month ($USD)

$211

average spend on transportation per month* ($USD)

$409

average spend on food per month ($USD)

Q13: What is your average monthly income in $USD?
Q14-Q16: What do you spend a month on average on housing/transportation/food in $USD?
Base: All respondents excluding those left blank (Q13 & Q14 n=38, Q15 n=34, Q16 n=36)
Source: 2021 Digital Nomads Survey

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APPEAL OF THE NOMAD LIFESTYLE

The most popular reason for living as a digital nomad is being able to travel constantly, not only while on vacation. Other reasons respondents gave included the feeling of freedom, pushing their limits, learning foreign languages, exploring, flexibility, and being able to work with indigenous and local people.

1 **TRAVEL**
Being able to travel constantly

2 **CULTURE**
Experiencing different cultures + meeting local people

3 **PLACES**
Experiencing places with a better cost of living

4 **SIMPLICITY**
Living a more simplified lifestyle

5 **CONNECTIONS**
Meeting like-minded people + other digital nomads

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BIGGEST CHALLENGES

While living as a digital nomad has its perks, respondents shared their difficulties as well. The top challenge was not being able to unplug and disconnect from work, although as digital nomads gain experience, they tend to find it easier to unplug.

Uncertainty is high all over the globe now, especially for travelers. This lifestyle can also lead to loneliness, potential financial difficulties, challenges collaborating and communicating, and a hard time staying motivated.

1 **NOT BEING ABLE TO UNPLUG**
Being constantly available and working too much

2 **UNCERTAINTY**
Not always knowing what tomorrow will bring

3 **LONELINESS**
Missing connections with home, family, and friends

4 **FINANCIAL DIFFICULTIES**
Freelancing doesn't always mean steady income

5 **COLLABORATING**
Communicating with coworkers and clients

6 **STAYING MOTIVATED**
Keeping on task with a positive attitude

Q18: What are the biggest challenges you have living as a digital nomad?
Base: All respondents excluding those left blank (n=54)
Source: 2021 Digital Nomads Survey

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RELIABLE INTERNET SERVICE

GOOD WEATHER

LOW COST OF LIVING

EASY VISA OR NONE NEEDED

DESTINATION ATTRACTIONS

DESTINATION REQUIREMENTS

The most important things for digital nomads when choosing a destination are reliable internet service, weather (especially for those aged 25-34*), and a low cost of living. Digital nomads (especially those aged 55-64*) look for destinations where they do not need to obtain a visa, or where it is easy to get and renew one. Cultural and natural destination attractions, security, and a good public transportation system are also important.

$p < .10$

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TOP DESTINATIONS FOR LONG STAYS

INDONESIA

MEXICO
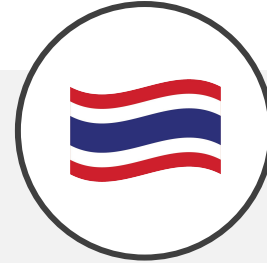
THAILAND

SPAIN

COLOMBIA
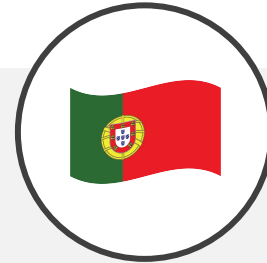
PORTUGAL

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TOP DESTINATIONS FOR MEDIUM STAYS

PORTUGAL

INDONESIA
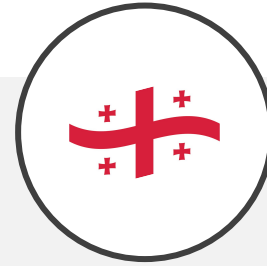
GEORGIA

MEXICO
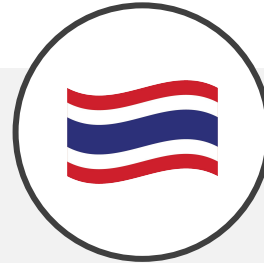
THAILAND

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TOP DESTINATIONS FOR SHORT STAYS

FRANCE

BRAZIL
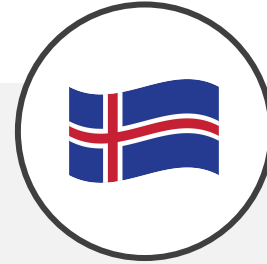
ICELAND

INDONESIA

COSTA RICA
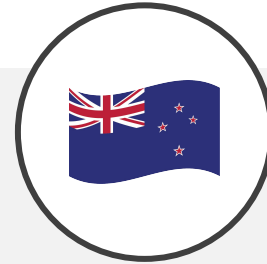
NEW ZEALAND

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RELIABLE INTERNET SERVICE

SUITABLE WORKPLACE

PRICE

CLOSE TO ATTRACTIONS

QUIET ROOM FOR MEETINGS

ACCOMMODATION
REQUIREMENTS

Reliable internet service is also the most sought-after feature when choosing an accommodation. When it is time to work, a suitable space and quiet room for meetings are also important. Being close to the beach or other destination attractions is more important than the room and property amenities, and digital nomads are looking for a place to interact with others. Access to public transportation was the least important item on the list.

RECOMMENDATIONS

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GENERAL RECOMMENDATIONS

1. **Offer ways for digital nomads to unplug.** All kinds of businesses can do something to help alleviate the pressure this group feels to always be connected to work. Cafes and other gathering places can have a section of their space dedicated as a "device-free zone," instead offering alternatives like board games, displays about local history or events, activities such as cooking classes, and other ways to encourage in-personal interaction to be present in that moment.
2. **On the other hand, also offer ways for them to easily connect with people at home.** Although digital nomads want to interact with other travelers, they also want to maintain their connections with friends and family at home. Amenities such as quiet video calling areas, identified points at attractions with a reminder to take a selfie and post it on social media, and other reminders of their contacts at home will help alleviate this concern around losing contact..
3. **Give stability to combat uncertainty and do not apply too much financial pressure.** Most digital nomads are freelancers or own their own business, meaning financial uncertainty is common. Businesses can offer discounts for paying in advance or suggesting flexible payment arrangements. Advertising long-term stays and any other ways of providing a routine or other stability is likely to be appealing.
4. **Provide ways for digital nomads to build a local community to avoid loneliness.** In addition to staying in touch with friends and family at home, digital nomads want a sense of community locally, by meeting other travelers and interacting with the local people. Businesses could organize special events for this purpose, or make efforts to communicate existing local events to digital nomads.
5. **Make sure digital nomads can collaborate with the people they need to work with.** Following the connection theme, the first priority of many digital nomads is making money to support their travels. They are going to be attracted to places with good internet, 24-hour workspaces to accommodate global schedules, and amenities like a coffee and snack bar to keep them fueled at all times of the day.

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DESTINATION RECOMMENDATIONS

1. **Have reliable internet service.** This is the number one priority for digital nomads, as they need internet to connect to their employers and their friends and family back home. Researching places to go and things to do at a destination is also a top concern to alleviate loneliness and experience the local culture.

2. **Talk about the weather.** Having good weather is the second most important thing our survey respondents look for in a destination. While to many digital nomads this could mean sun and beaches, others might be more attracted to a cooler or drier climate. Communicate your weather strengths to this market.

3. **Promote how to live on a budget.** Digital nomads also like to visit places with a low cost of living. This does not necessarily mean that expensive destinations are out of reach, but they may be preferred for a shorter length of stay, or visitors may look for budget accommodations and more affordable food options. Tell this group what your destination can give them within different budget ranges.

4. **Easy visa or no visa needed.** Many destinations are implementing easy-to-obtain visas meant for freelancers, business owners, and others who can make income while they travel. Digital nomads may be willing to pay application fees, show proof of a minimum income, and go through some inconvenience, but the process must be clearly communicated. The easier a destination can make obtaining a visa, the more appealing it will be to this group.

5. **Showcase attractions.** Most travelers visit a place to see the attractions. This may mean famous 'must-see' landmarks that digital nomads will check off their list, but they also want to see lesser-known spots. Work with local operators to develop and market tours and activities that also relay something about the local culture.

ACCOMMODATION RECOMMENDATIONS

1. **Have reliable internet service**. Digital nomads need high-quality and widely accessible internet service. Not all will want to work in their guest room; service should also be available in dining areas, public spaces, and outdoors.
2. **Offer workspaces.** Rooms equipped with desks may be appealing, but having private and quiet areas for writing, being on video calls, and other tasks offer flexibility for different work styles and preferences. Having some spaces be available 24/7 will also help accommodate this global way of working.
3. **Promote special deals or packages.** Providing lower rates for long-term stays helps alleviate concerns about stability and cost of living. Consider packaging stays with affordable transportation, some low-cost dining choices, or activities.
4. **Talk about what is nearby.** Even though location is not something that can easily be changed, tell digital nomads about what your accommodation can offer. Promote nearby supermarkets or local cafes, and lesser-known attractions. Suggesting or providing transportation to more popular areas may also attract members of this group that are looking for quieter or more remote places to stay.
5. **Help them stay motivated.** Another challenge digital nomads face is staying on task. Supporting a community atmosphere will appeal to them; this could mean facilitating work sessions with other digital nomads, having a place to talk about accomplishments in a shared space, giving work tips, offering free coffee in the morning, or other ways to keep them motivated.

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TOUR & ACTIVITY RECOMMENDATIONS

1. **Connect digital nomads for group tours.** Many in this group want to see the attractions in a destination, but may not be sure how to get there. Scheduling specific trips for digital nomads will help them socialize, and trips on their weekend or evening relaxation time may be more appealing to them than busy mid-week trips filled with tourists.

2. **Get on social media.** Many digital nomads rely on Facebook groups to find recommendations for everything from local tours to hair stylists. Be sure your business is connected with this community to be seen as a friendly expert. Other digital solutions like self-guided tours using a digital smartphone app may also be appealing.

3. **Have extended hours of operation.** To accommodate this group's unconventional working style and schedule, staying open late and offering late evening or night tours gives them more of an opportunity to take a tour with you or visit your attraction.

4. **Offer 'local hotspots' tours.** Digital nomads want to experience the local culture, which means meeting the local people and doing what they do.

5. **Organize culinary events.** Food is a top priority for this group, and can be incorporated into many different activities. This could mean putting together a pub crawl, coordinating a traveling dinner with each course at a different restaurant, or bringing together different food and beverage outlets for a tasting event.

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THANK YOU

DIEGO ARELANO

For acting as a liaison with the digital nomad community and sharing his experiences.

SARBJIT GILL

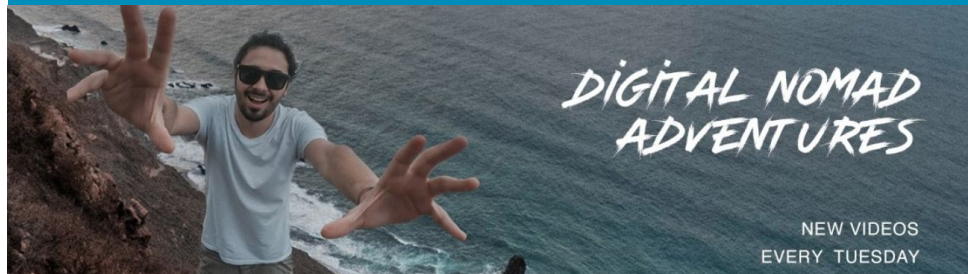For the creative inspiration for this report.

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Joining the ATTA as a member helps your business develop, introduces you to the best and brightest minds in the industry, and allows you to have a bigger impact by collaborating on a collective purpose.

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About the ATTA

Established in 1990, the Adventure Travel Trade Association is the largest global network of adventure travel leaders. Our community is made up of ~30,000 individual guides, tour operators, lodges, travel advisors, tourism boards, destination marketing and management organizations, outdoor educators, gear companies and travel media who share a belief and commitment to sustainable tourism. The connections and creativity of this vibrant community come together both virtually and in person to create and deliver the solutions that propel our businesses and our communities toward a responsible and profitable future.

About our Research

The ATTA strives to produce regular reports that take the pulse of the industry through our membership as well as the global travel industry. In addition, consumer research studies lend insight into the fast paced and changing world of travel and travelers' perceptions of it. At adventuretravel.biz, our Research Reports can be located that dive deeply into the motivations of adventure travelers, the size of the industry, the landscape and health of the industry at large, as well as other targeted reports on subjects ranging from Travel Agents to adventure travel in specific destinations.

The ATTA's Web Properties

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The ATTA's homepage online at adventuretravel.biz

ADVENTURE
Travel News

The adventure travel industry's source of trade news online at adventuretravelnews.com

ADVENTURE
.TRAVEL

The traveler's guide to finding adventure at adventure.travel

ADVENTURE
HUB

ATTA's Online Members Community at members.adventuretravel.biz

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