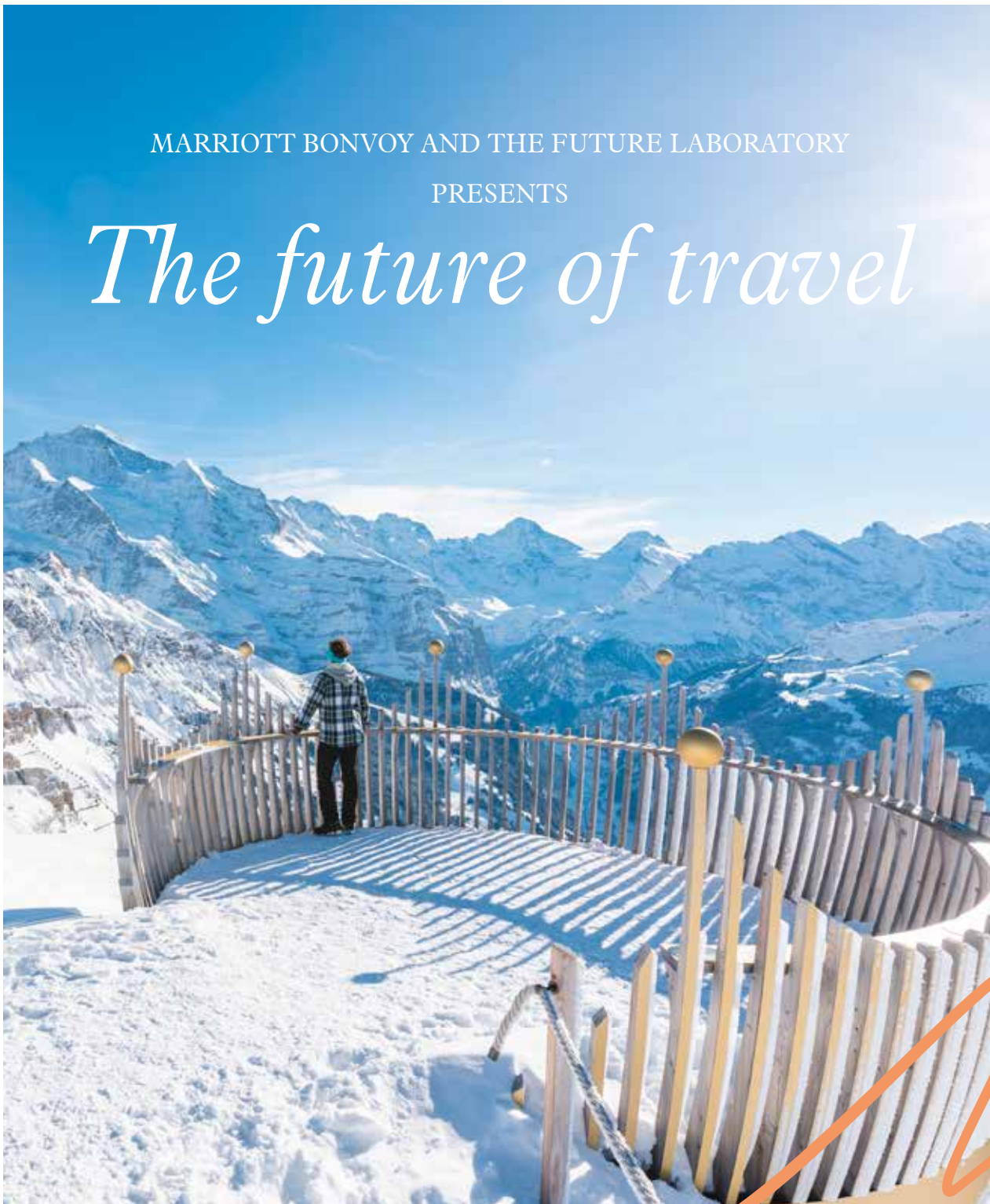


MARRIOTT BONVOY AND THE FUTURE LABORATORY

PRESENTS

The future of travel



MARRIOTT
BONVOY[™]



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FOREWORD

Marriott Bonvoy 2024 Future Travel Trends

With the leisure travel market well and truly back to 'normal' we are now in a stronger position when it comes to looking at future trends and travel habits for the sector over the next few years – hence the launch of the Marriott Bonvoy 2024 Future Travel Trends research, in collaboration with foresight agency The Future Laboratory. We have analysed the travel plans and aspirations of 14,000 travellers across Europe and the Middle East over the next three years.

The consumer data from this supports what we are seeing commercially – that the post covid travel rebound is still going strong and we continue to see a significant desire for travel from our members, our guests and our customers to see the world.

The Power of Travel – and its ability to connect people – is now better appreciated after a few years where the opportunity for travel was heavily restricted. Many people have realised that travel is a key source of enduring joy, wellbeing, and personal growth.

The speed of the recovery has surprised many of us – but it is an indication of how badly we had all missed that ability to broaden our horizons and make new connections through travel.

This is of course a wonderful thing for our industry, not least after the challenges of the past few years. However, we must reflect on how customer expectations and attitudes towards travel have undoubtedly evolved. We have seen that there has been a seismic shift in people's thought processes and the prioritisation of funds around travel. In addition, we are seeing the ever-increasing importance of sustainability, resulting in a more considered approach to travel.

What we uncover in this report demonstrates how priorities have changed following the disruption of the past few years – and where we as hoteliers must focus our attention in the coming years. As you will read there are some clear themes that emerge – which point to a very positive picture on the overall trajectory of the travel industry in the years to come. And I'm excited for what the future holds.

Neal Jones

Chief Sales & Marketing Officer,
Marriott International
Europe, Middle East & Africa



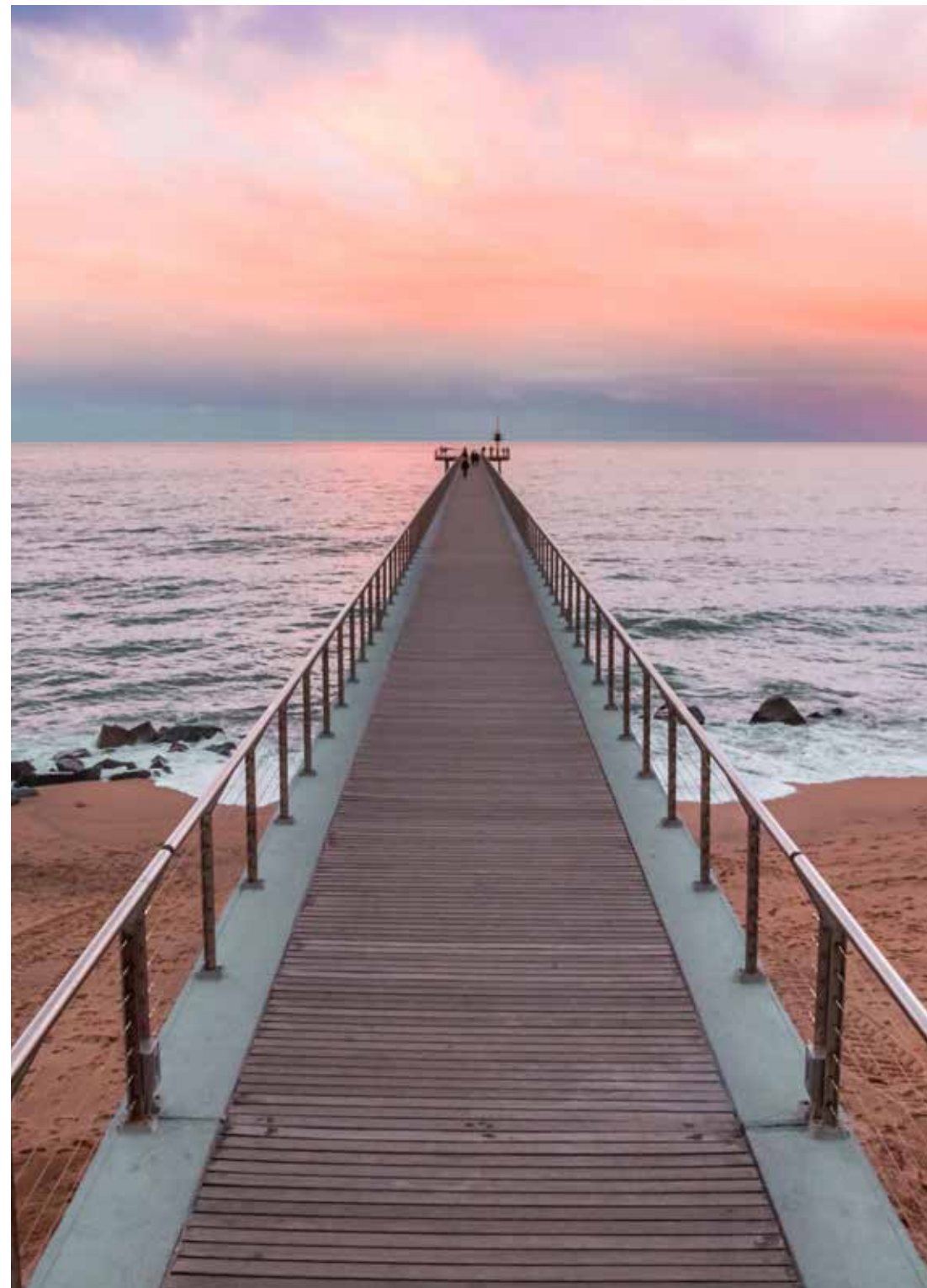
PART ONE

Introduction

Travel isn't just back on the agenda, it's rising to the top of the list. Across regions and demographics, individuals are catapulting travel experiences from something nice to have to something they need to have, repositioning exploration as a vital tenet of a healthy, happy and meaningful life.

The demand is clear: across Europe over three quarters (79%) of consumers plan to go on holiday in 2024, with the figure rising to about nine in 10 respondents in the United Arab Emirates (UAE) (93%) and Saudi Arabia (89%), according to research from Marriott Bonvoy. Fewer than 10% of respondents across regions such as France (8%), Italy (5%) and Saudi Arabia (5%) aren't planning a holiday in the next three years, with the figure as low as 2% in the UAE.¹

'It's not a short-term rebound and consumers are moving beyond 'revenge travel,' says Neal Jones, Chief Sales and Marketing Officer, Europe, Middle East and Africa at Marriott Bonvoy. 'The reality is that the psyche of human nature has moved towards absolutely prioritising experiences. There's a more considered approach to travel and a more emotional connection to travel that's really unfolding in tandem with people's core values.'



Five Key *Consumer Values*

In this report, we explore five shifts illustrating how travellers' priorities today will transform the industry tomorrow. These take shape across key consumer values:

Pioneering New Frontiers

Boundary-breaking escapes meeting consumers' desire for authenticity and exclusivity

Ethical Escapes

Conscious, value-adding practices ensuring sustainable travel futures for people and the planet

Equitable Itineraries

Ensuring places and spaces are accessible and accommodating to every traveller

Destination Wellbeing

Travel redefined as a necessary optimisation of people's lives

Tech-enhanced Experiences

Traveller-first tech enabling brands to optimise, personalise and incentivise key offerings

Through a series of expert interviews combined with quantitative research across Europe and the Middle East, The Future Laboratory, in partnership with Marriott Bonvoy, examines how these shifts are taking root. We explore the spaces, destinations, initiatives and activations that brands must harness to meet the needs of now-and-next travellers.

Get it right, and travel and hospitality innovators have the potential to pioneer transformation in the industry and beyond, creating a blueprint for how brands can promote meaningful, transformative, inclusive and sustainable offerings that don't just benefit the individual – but also communities, societies and the world at large.

PART TWO

The Future of Travel

Through our research, we have identified five key pillars underpinning the future of travel across luxury, sustainability, wellbeing and technology.

Here we explore the key values, market shifts and innovations taking root across the industry, highlighting the ways in which future hospitality brands, spaces and experiences will change to inspire and facilitate meaning, change and enjoyment for travellers.





KEY CONSUMER VALUE :

Pioneering New Frontiers

Luxurians are reframing travel beyond star ratings, with exclusivity, authenticity and the unexpected comprising the new codes of luxury. Here, brands are seizing upon 'money-can't buy strategies' to build long-lasting and enriching relationships with their VIP clientele – offering transformative access, unbridled services and once-in-a-lifetime experiences that long outlast their travel itineraries.

For luxury consumers, travel is a lifestyle non-negotiable. Marriott Bonvoy research reveals that over three quarters (77%) of luxury consumers earning £100k (€115k) and above across Europe and the Middle East take at least two international trips each year.² About half of respondents in the UAE (49%) and Saudi Arabia (51%) take more than five domestic trips each year, while in Spain, almost one third (30%) of travellers enjoy seven or more domestic holidays annually.

Notably, travel assumes a large proportion of this cohort's spending. Across regions, respondents ranked travel as the non-essential item they prioritise and the area they spend the most on. In Europe, high-earning respondents will spend over one fifth of their annual income on holidays or breaks each year – averaging 22.7% in Italy and 23.2% in Germany. In the Middle East, spending is higher still, with travellers in the UAE (26.8%) and Saudi Arabia (27.4%) spending over one quarter of their income on average.

Consulting group Deloitte also highlights how the global luxury travel market is reaching new highs. Worth a colossal £982bn (€1.1 trillion) in 2021, the market is set to increase at a compound annual growth rate (CAGR) of 7.6% in the lead-up to 2030. One of the factors behind the growth is a rise in demand for luxury hotel rooms. Deloitte reports that bookings at five-star hotels increased by 19% in the first three quarters of 2022 compared with the same period in 2021.

Travel spending may be rising, but so are travellers' expectations – with the shape of luxury changing course in multiple directions.

'There's a return to the Gilded Age of Travel at the higher end of the luxury market, with an emphasis on discretion, opulence, exclusivity and codes that are only decipherable to the connoisseur,' explains Lucie Greene, trend forecaster, brand adviser and founder of Light Years consulting. 'In the broader luxury space, you have Millennials becoming the central luxury consumers, who are looking for connection, community and cultural programming that brings people together. They see themselves as stakeholders in communities rather than guests.'

To meet new and established luxurians where they are, luxury travel and hospitality brands are innovating, supplementing traditional product offerings with a broadening suite of ultra-bespoke services and immersive experiences that exceed expectations. Here, we explore these shifting consumer values and brand responses across two key trends:

In-the-Know Experiences and Branded Hotspots.



In-the Know Experiences

The influx of quiet luxury in the travel sector is creating a new wave of 'if-you-know, you-know' experiences, with hidden gems, invitation-only hotels and intimate moments upholding an aura of exclusivity in the era of luxury omnipresence.

Discreet destinations – locations virtually impossible to find online – are satisfying luxurians' desire for the unreachable.

Global research from YouGov reveals that unique experiences that allow travellers to visit remote destinations and get close to nature are at the top of luxury travellers' lists (31%), with a similar figure (27%) now seeking villas and chalets in secluded and private locations.

Seeking to discover the undiscovered, travellers are flocking to destinations like Jicaró Island in Nicaragua, where TVs and Wi-Fi connections are swapped for freshwater lakes, howler monkeys and lakeside yoga glasses. Prioritising privacy, the Seychelles' North Island, a Luxury Collection Resort, Seychelles houses 11 luxury villas and almost nothing else. The untouched nature of Côn Sơn, Vietnam, the colourful reefs of Desert Island, UAE, and the green pastures of The Azores, Portugal, also offer surprises for luxury consumers.

Hotels are also going off-grid – making themselves available only to those in the know.

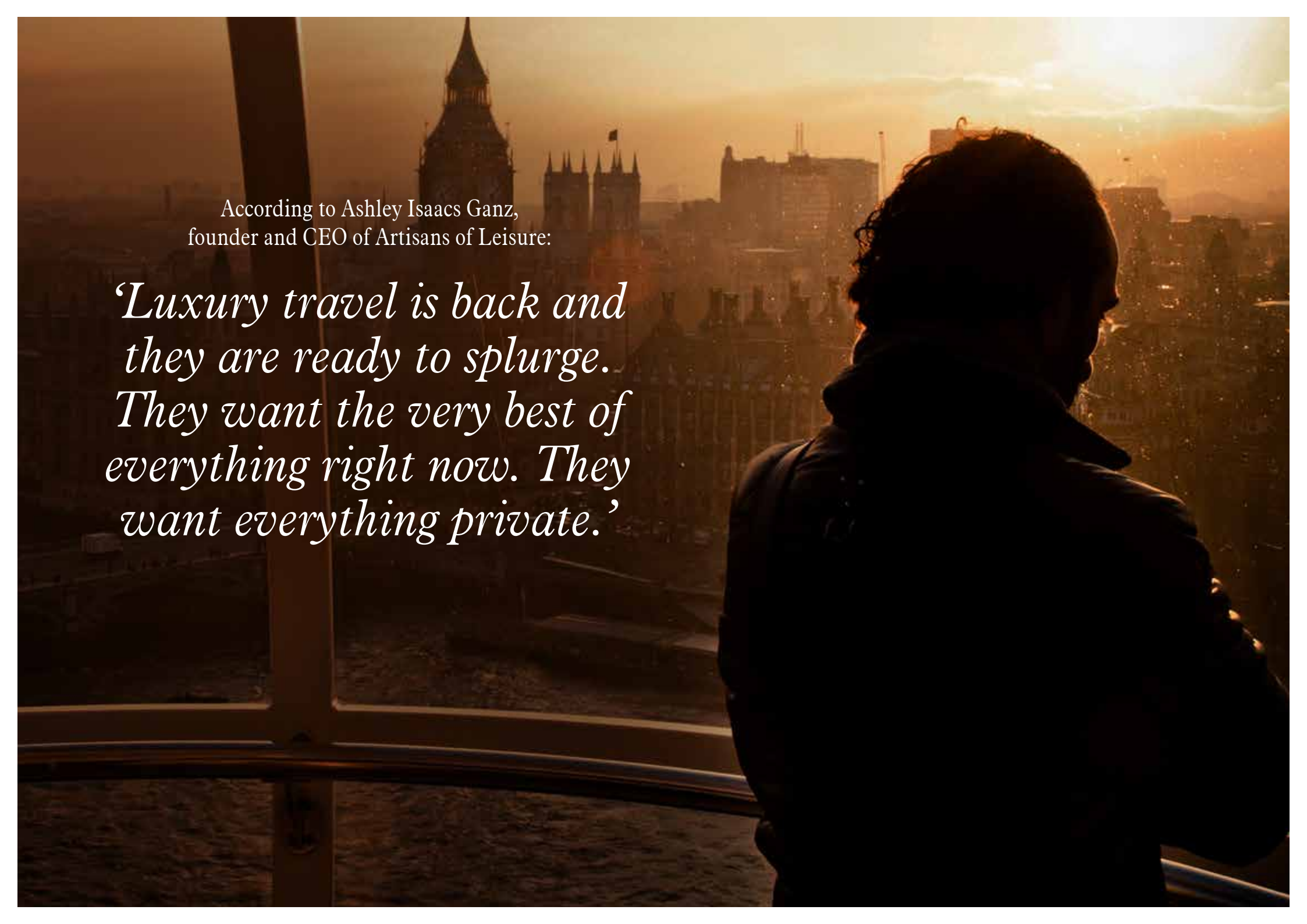
For Jack Ezon, founder of New York-based boutique travel firm Embark Beyond, these rumoured accommodations carry a cachet equivalent to the unlisted phone numbers of the 1990s.

'More and more clients want the unattainable,' he explained in an interview with Bloomberg, noting that his clients are less concerned about privacy and instead set on staying in locations 'that no one has heard of or has access to'.

Beyond hidden hotspots, luxury consumers are seeking out enlightening experiences through education and personal growth. Marriott Bonvoy research reveals that

1/4 of luxury consumers believe luxury travel experiences are investments that will last

with this motivation resonating particularly with 35% of 25–34-year-olds.

A person is shown in silhouette from the back, looking out over a city skyline at sunset. The sun is low on the horizon, casting a warm, golden glow over the buildings and the water in the foreground. The person is standing on a balcony or walkway with a railing.

According to Ashley Isaacs Ganz,
founder and CEO of Artisans of Leisure:

*‘Luxury travel is back and
they are ready to splurge.
They want the very best of
everything right now. They
want everything private.’*

Luxury travel agency The Luminaire targets 'deeply curious' travellers with bespoke experiences that immerse people in local cultures. One way is through a partnership with Magnum Photos allowing enthusiasts and amateurs a chance to learn from celebrated photographers such as Cristina Garcia Rodero, Jonas Bendiksen or Alex Webb on trips to Mexico, Norway or Cape Cod.

This drive for discovery is meeting the needs of consumers in Middle Eastern regions particularly, where over half of respondents in the UAE (56%) and Saudi Arabia (54%) say they expect added-value experiences when staying in luxury resorts or destinations, according to Marriott Bonvoy research.

For Bill Bensley, architect, and designer of over 200 hotels and palaces, these illuminating opportunities are the key to cutting through the noise and meeting future luxury travellers where they are. 'You won't find a lobby full of flowers, for example.

Savvy travellers don't care about these things any more,' he explained to Architectural Digest.⁶ 'They want to discover new trails or the best place to catch a boat to see kingfishers. These are life-changing experiences that are a hell of a lot more important than what kind of flowers are in the lobby.'

*'Over 1/2 of people
in UAE and
Saudi Arabia now
expect added-value
experiences when
staying in luxury
resort or destinations'*

Branded Hotspots

Global luxurians are seeking travel experiences that pair luxury locations with exclusive art, fashion and music offerings, resulting in 360-degree branded hospitality that extends travel beyond the destination.

At a time when 77% of luxury consumers would buy a product or service simply for the experience of being part of its community, according to Global Web Index, luxury brands are becoming curators of money-can't-buy moments through exclusive getaways.⁷ Invitations to these physical events are both scarce and highly coveted, representing a future of luxury brands as assemblers of people and cultural moments.

One example is luxury jewellery brand Cartier's experience for Very Important Clients (VICs) in Toledo, Spain. The multi-day retreat included winery tours and a private runway show of the brand's Beautés du Monde collection. The getaway ended with a private concert by the Black Eyed Peas.

Brands are also cultivating community ties by facilitating money-can't-buy connections. Jewellery company Piaget sponsored a series of events in the AlUla region of Saudi Arabia, where guests were given a chance to rub shoulders with Piaget's C-suite, including the company's chairman Yves Piaget and former CEO Chabi Nouri.

Partnering with luxury brands on such initiatives opens up a host of community-building opportunities for hospitality leaders, with these brands primed to translate authentic and immersive experiences that reflect their customers' tastes and interests across design, fashion, art, culture and even food.

For Joel Bartfeld, founder of travel platform Joel Found, such initiatives offer companies a ready-made audience for branded journeys that chime with next-gen travellers.

'Brands have audiences and fans who often wish to share in their lives,'

'It's 'complementary, not competitive' to a brand.'

KEY CONSUMER VALUE :

Ethical Escapes

Sustainability doesn't need a publicist. In 2022, 58% of global consumers said extreme weather events encouraged them to do more to protect the environment, according to Mintel, with innovators across industries now forced to change tack to meet the regenerative and eco-commitments of today's consumers.

As this drive moves from a nice-to-have to a need-to-have, the travel industry, inseparable from the world's changing landscape, is uniquely tasked with transforming or facing turmoil. Now, a new approach that reframes ethical travel as key to enhancing, not limiting, future travel is required.

For travellers, the meaning, motives and methods behind their experiences are shifting in sync with the world around them, as they look to destinations, initiatives and hospitality venues that allow them to align their values with their travel expectations.

'Next-gen travellers are keen to demonstrate that they are living the values they believe in through their travel and experiences,'

Explains Marriott International's Neal Jones.

'They are looking to build deeper, emotional connections to the places they are visiting – to understand and be close to the local environment, and in many cases, to give back to it.'





This new set of conscientious travellers are reframing sustainable holidaying as a value addition, with conservation, community integration and slow transport initiatives providing not just responsible, but wholly rewarding, travel experiences. Here we explore this shifting landscape through three key trends:

Community *Consciousness*

Conservation *Climates*

Flight *Light*

Community Consciousness

Next-gen travellers are recognising that sustainable travel is responsible for both people and planet, and are seeking hotel and hospitality spaces that are authentic, respectful and provide a solid utility for local communities – not just their visitors.

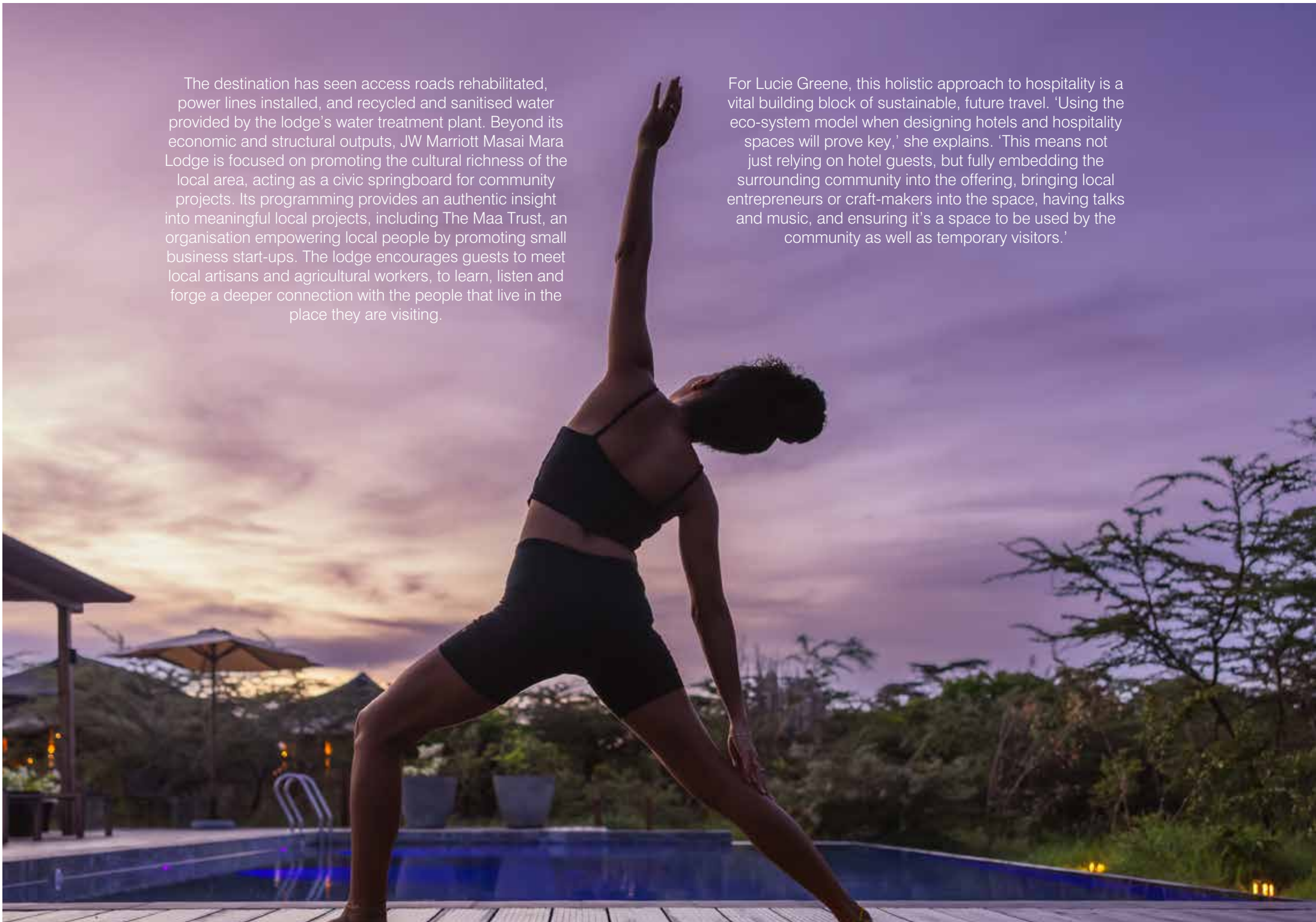
It's a drive key to consumers across the Europe, Middle East and Africa (EMEA) regions. Research from Marriott Bonvoy reveals that over three quarters of travellers across Spain (83%), the UK (80%), Saudi Arabia (79%) and France (76%) think accommodation providers and holiday companies have a responsibility to support the local communities where they offer holidays, with this figure rising to almost nine in 10 (88%) respondents in the UAE.

Developing projects alongside communities will prove vital. The recently opened JW Marriott Masai Mara Lodge in Southwestern Kenya – Marriott Bonvoy's debut in the luxury safari sector – was developed in partnership with the local community from its inception, with a focus on both limiting disturbance to the local area, and strengthening its infrastructure and economy. Developed on tourism-designated land, much of the lodge's construction was undertaken by local experts and technical specialists, with 60% of the location's staff from the local community.



The destination has seen access roads rehabilitated, power lines installed, and recycled and sanitised water provided by the lodge's water treatment plant. Beyond its economic and structural outputs, JW Marriott Masai Mara Lodge is focused on promoting the cultural richness of the local area, acting as a civic springboard for community projects. Its programming provides an authentic insight into meaningful local projects, including The Maa Trust, an organisation empowering local people by promoting small business start-ups. The lodge encourages guests to meet local artisans and agricultural workers, to learn, listen and forge a deeper connection with the people that live in the place they are visiting.

For Lucie Greene, this holistic approach to hospitality is a vital building block of sustainable, future travel. 'Using the eco-system model when designing hotels and hospitality spaces will prove key,' she explains. 'This means not just relying on hotel guests, but fully embedding the surrounding community into the offering, bringing local entrepreneurs or craft-makers into the space, having talks and music, and ensuring it's a space to be used by the community as well as temporary visitors.'



Notably, it's a drive welcomed by luxury travellers – where 42% across Europe and the Middle East prefer to stay in hotels designed to reflect the local neighbourhood and culture, according to research from Marriott Bonvoy.

Smart initiatives are also working to connect the dots between places and people. The Netherlands-based Withlocals is one example. Connecting travellers to local hosts across six continents, the organisation offers private, personalised tours for visitors that immerse them in the local community. Each experience is centred on directly serving its destination by supporting local suppliers and ensuring that travel helps to preserve the cultural heritage of a place for future generations.

As Juliet Kinsman, sustainability editor of Condé Nast Traveller, explains:

‘Travel should be about immersion, about journeying into someone else’s places and culture, not about picking people up and placing them somewhere.’



Conservation Climates

Destinations are prioritising smart conservation – taking tactical approaches to hospitality and tourism in a bid to protect local landscapes, while maintaining the benefits visitors have on communities and the economy.

Already, a majority of travellers across the EMEA regions look into the environmental impact of their travel plans, according to research from Marriott Bonvoy. Over three quarters of respondents in Saudi Arabia (77%) and the UAE (84%) are likely to check sustainability credentials, with these travellers (78% and 83%, respectively) also the most likely to pay more for accommodation that is environmentally friendly.

In Europe, travellers are also willing to offset their sustainable footprint, with about half of respondents in Spain (50%), Italy (49%), France (44%) and Germany (43%) willing to pay up to 10% more for eco-friendly accommodation.

Hospitality venues have an opportunity to set new sustainable standards – creating venues that not only give back and minimise disruption, but also developing structures, designs and details built in harmony with the natural environment.

W Costa Navarino in Greece's southwest Peloponnese is inspired by the region's traditional residential areas, using local, natural materials such as stone, wood and reed to complement the hotel's environment.

Meanwhile in Norway, the independent Juvet Landscape Hotel is focused on topography conservation and optimisation – comprising log houses and spa units built on stilts to accommodate the nature reserve's dense vegetation and steep terrain. Importantly, no rooms required blasting of rock or changing of the terrain to accommodate the building.

For Condé Nast Traveller's Juliet Kinsman, this approach to respecting and repurposing natural environments will prove key to luxury travellers.

'People are looking for places that breathe new life into existing destinations, habitats, even structures,'

She explains.

'It's a rising concern for luxury consumers. They're less interested in property developments that have ripped something down, only to build a new property in its place, and are looking towards unique spaces built in tandem with the local environment – it's a new exclusivity.'





For hotels, prioritising eco-initiatives that reflect local environments and their needs will prove key – setting the industry on a path to net zero and circularity. It’s a key goal for Marriott Bonvoy, which is making the most of the size and scale of its eco-system to get this right for its people, its guests, its communities and the planet.

With today’s travellers conscious of water and energy usage, and waste optimisation, the company has vowed to cut food waste in half by 2025 – using AI technology, vertical farms and collaborations with local farmers to get it there. In Dubai, Grosvenor House, a Luxury Collection Hotel, has adopted an AI system in its kitchen, resulting in a 72% drop in waste.

Energy is always a focus, with four Marriott International hotels in Jordan now fully powered by a solar energy farm with 35,000 panels. Elsewhere in Switzerland, Geneva Marriott Hotel has been designed with dynamic glass that tints in the sun and ventilated cladding which helps control the temperature – a move which has reduced energy consumption by up to a quarter. Circular initiatives are also emerging: The St. Regis Mardavall Resort in Mallorca has blended Balearic sailing tradition with the latest technology to create 100% electric Llaüt boats for guests.

Flight Light

Hybrid travel itineraries and slow trips are making the journey part of the adventure. Eco-minded 'flexi-air-ians' are looking to intersperse air travel with carbon-lighter train journeys, presenting key opportunities for change in where travellers are going, and how they arrive.

Across territories, slow travel – defined as not taking the fastest route to one's destination – is on the rise. Research from Marriott Bonvoy reveals that almost half (45%) of respondents across the UK, Italy, France, Spain and Germany have been on a slow holiday previously, with the number rising to over three quarters for travellers in Saudi Arabia (77%) and the UAE (82%).

In the UK, nearly half (49%) of respondents have chosen not to drive or fly to a destination and use alternative transport to reduce their carbon emissions. This figure rises to 64% for those aged 18–24 in the UK, and to a markedly higher proportion for adult travellers in Saudi Arabia (71%), Spain (72%) and the UAE (78%).

To promote this sustainable drive, hospitality and travel initiatives are reframing alternative transport as part of the experience. Already, slow travel operator Byway is making flight-free trips especially appealing. It organises multi-destination journeys by train, bus and boat in a way that avoids planning and admin headaches – giving travellers more for their time in transit. An 11-day round trip from Amsterdam to Corsica includes a scenic ferry from Ajaccio to Toulon, a one-night stay in the colourful port town of Cassis and a train along the sweeping vineyards of the Côte d'Azur.

In Germany, facilitator Slow Travel Experience aims to make non-air travel even more experiential. The company hosts scenic pilgrimages across southern France, sailing trips from Europe to South Africa and the Caribbean, and even cargo and freighter trip travel from The Netherlands to Cuba. Slow Travel Experience spotlights its dual benefits: positioning its offerings as not just a useful way to get from point A to B with minimum carbon output, but also a way to experience unexplored horizons and oceanic landscapes.



KEY CONSUMER VALUE :

Equitable Itineraries

Future travel will recognise the diversity of travellers' needs. As inclusivity increasingly becomes a non-negotiable across several markets, consumers will expect hotel brands to be considerate, compassionate and sensitive to their requirements, and to those of others.

Travellers across regions are ranking inclusivity high on their agendas. Marriott Bonvoy research shows that almost three quarters of travellers in Italy (70%), the UK (72%) and France (73%) say it is important that holidays and accommodation options are inclusive and welcoming to adults of all different groups, preferences and ages. For respondents in the Middle East, this is paramount, with almost nine in 10 (87%) travellers in the UAE, and 85% of those in Saudi Arabia prioritising inclusivity.

For Condé Nast Traveller's Juliet Kinsman, hospitality venues outwardly living inclusive values will set the industry on a positive path to the future, outgrowing its impact on the travel sector alone.

'Spaces need to give visibility to guests, and to staff, of all generations, diversities, even family types,'

She explains.

'Making everyone feel seen, heard and catered for isn't just good practice for business – it can foster a culture of communication and camaraderie, and have real social impact.'

A wave of new hospitality spaces, activations and initiatives are striving to meet travellers where they are and with what they need, ensuring that every group can experience, and get the best from, their travel experiences. Here, we explore this drive in two key trends: *Solo Sojourns* and *Reframing Affordability*



Solo Sojourns

Solo travellers are refusing to pay the 'singles tax', instead seeking inclusive travel and tourism brands that facilitate their quest for self-exploration and enjoyment. As consumers look to travel to find purpose and reinvigoration, the trend is crossing generations, reaching Millennials delaying traditional markers of adulthood in favour of adventure, and silver spenders using their increased time and money to tick off bucket list destinations.

Google Data shows that post-pandemic searches for 'solo travel' have increased by 761%, with the sector showing no signs of slowing down. Research from Marriott Bonvoy reveals that over half of younger UK travellers, including 18–24-year-olds (50%) and 25–34-year-olds (52%), have enjoyed solo travel in the past three years. The trend is showing particular buoyancy in the Middle East, where 70% of UAE respondents and 69% of Saudi Arabia respondents have already travelled solo, with almost three quarters (72%) of travellers in the latter region likely to do so in the next three years.

To engage these consumers on a deeper level, travel brands will centre their offerings around the unique attributes of solo travelling, rolling out services and experiences that allow travellers to reconnect with themselves and those with shared interests. Research from SkyScanner points to this drive, where over half (52%) of UK solo travellers choose to go their own way when family and friends don't align with their plans.

The WeRoad Collection's solo travel option provides individual travellers with the choice and autonomy they crave, with a carefully curated selection of trips and itineraries to some of the world's most exciting destinations, including Japan, Vietnam, Tanzania, Jordan, Morocco, Thailand, India and Turkey. Travellers are given a complete guide to what each trip will entail – including activity level – with an easy-to-follow code that ranks the tour's key attributes: from relaxation to nature and adventure, and from monuments and history to party and nightlife.



Reframing Affordability

Conscious consumers are still spending on travel, but the significance of budget-friendly options is growing. Now, brands are tasked with repositioning affordability and access – ensuring travel can be enjoyed by all.

In today's fluctuating economic climate, price is paramount. In Europe, the cost of accommodation is the key factor for two thirds (65%) of respondents looking to travel in the next three years, according to research from Marriott Bonvoy – with 71% of Spanish travellers particularly price-conscious.

Already, travel initiatives are striving to ease inflationary pressure, while ensuring that travellers don't miss out. Skyscanner's Destination Decider, for example, empowers travellers to find under-rated, unique and budget-friendly alternatives to popular destinations. Swapping Tenerife for Naples, for instance, can save travellers up to 58% on flights, and trading Dalaman for the French town of Menton presents an opportunity to enjoy savings while exploring nearby attractions.

It's a move key to travellers across regions. Marriott Bonvoy research shows that consumers in Spain (36%), Saudi Arabia (34%), Italy (34%) and the UK (26%) will be seeking 'dupe destinations' as a means to save on travel in the next three years – with domestic holidays also on the rise.

Loyalty schemes will also prove key, providing travellers with tangible tools to help them travel smart and be rewarded every time. Marriott Bonvoy – the travel programme from Marriott International – is one example, enabling members to earn points for stays at hotels, resorts and premium home rentals. They can then redeem these points for future stays and incredible experiences around the world – or can transfer their Points into their Frequent Flyer Account.

As we look to the future, the industry will take the lead from innovative programmes and memberships that offer autonomy and savings for their loyal members. An example is group subscription app Together Price, which is turning membership models into a collective venture. The app allows consumers to enjoy joint subscriptions and loyalty schemes with users around the globe – providing users with a platform to make communicating and sharing costs among members of group subscription plans easier.

As price-savvy consumers continue to shop for the best travel offers and deals, innovative and personalised membership schemes could go some way to solidify consumer loyalty, enabling travellers to earn, share and spend points, even when they aren't travelling.





KEY CONSUMER VALUE :

Destination Wellbeing

With wellness travel on the rise, consumers are looking beyond the experiential and towards the holistic – seeking places and spaces to enrich and energise their everyday lives. In turn, where, when and how often people travel is being transformed as its status shifts from an optional escape to a necessary tenet of a healthy and meaningful existence.

Post-pandemic living has hyper-charged health consciousness into the mainstream, forcing all of us to consider what it means to be healthy. Accordingly, post-pandemic consumers are seeking wellbeing in all experiences – travel chief among them – ushering in an era of recuperative hotel stays, blended work and leisure escapes, and dedicated longevity clinics.

Global research from Accenture, which includes France, Germany, Italy, the UAE and the UK, has found that consumers are willing to splurge on health and wellbeing despite economic uncertainty – with respondents believing that spending in the sector is as essential as grocery and household spending categories.

This consumer drive is paving the way for innovative approaches to hospitality destinations, as consumers redefine travel, not as an escape from everyday life, but as an opportunity to optimise their own. Here, we explore the values and developments driving this shift through two key consumer trends: *Holistic Hospitality* and *Wandering Workers*.

Holistic Hospitality

Travel is widely perceived as integral to health and wellbeing. Accenture reveals that one third (33%) of respondents across the globe are willing to cut down on other non-essential household products to maintain their experiences, while research from Marriott Bonvoy shows that respondents across EMEA regions rank switching off and feeling healthier among their top travel priorities. 'Treating myself' is ranked as key by almost half (46%) of travellers in the UK and Germany, while 45% list 'sleeping well every night' as vital.

'Healing services used to be purely aspirational and often centred on luxury offerings,'

Says Lucie Greene.

'Now, there's a growing recognition that practices such as meditation, access to spas, cold water swimming, nature walks, saunas and natural geysers have valuable public benefits for mental health and community, and should be available to all – either as public services or employee benefits. Even in entry-level hotels there's a recognition of the importance of wellness offerings.'

With the intermeshing of wellness and travel redefining the hospitality landscape, spaces and services are looking to optimise guests' wellbeing during and beyond their stay. Westin Hotels & Resorts for example, provides a hotel experience through the brand's six pillars of wellbeing – Sleep Well, Eat Well, Move Well, Feel Well, Work Well, and Play Well – allowing guests to personalise their stay and engage in bespoke wellbeing programming that best meets their needs.

Focusing on sleep and rejuvenation, The Hästens Sleep Spa in Coimbra, Portugal, is a collaboration between Hästens, a Swedish luxury bed brand, and Grupo O Valor do Tempo. The hotel's sleep specialist, Dr Edie Perry, provides guests with sleep consultations, guidance on winding down and advice on sleeping postures.

At present, resident sleep doctors and REM consultants may be reserved for specialist sleep clinics, but for Harley Street hypnotherapist and sleep expert, Malminder Gill, its emergence signals the future of a holistic approach to hospitality. 'Guests want more than just a bed for the night,' she explains. 'They want an experience and something that enhances their wellbeing. Better sleep has numerous positive effects on the body and psyche.'

Set to open soon, the SIRO One Za'abeel in Dubai will target optimisation-focused guests and is billed as the ultimate destination for wellbeing and recovery. Combining digital technology with expert athlete guidance, the hospitality venue aims to help travellers achieve peak mental and physical performance – through a suite of bespoke training programmes, a dedicated app, nutrition plans, 3D body scans and mindfulness coaching.



Wandering Workers

Post-pandemic, individuals are extending hybridity to their holidaying – forgoing the strict segregation of business and leisure time to enshrine Bleisure as a key travel concept, embedding relaxation, discovery and new experiences into the everyday.

‘As hybrid living and working lifestyles take hold, the way people travel is changing,’

Explains Lucie Greene.

‘Hotels will act as the lifestyle connectors between a person and a place, facilitating more nomadic ways of living by designing spaces that make people feel like residents rather than guests. This includes allowing for more long-term stays and hybrid models of self-catering, or home-like services.’

The post-pandemic rapid adoption of hybrid working has made Bleisure more accessible, and more commercial. Research from Future Market Insights reveals that the Bleisure tourism industry accounts for almost 33% of the global business travel market, with the market expected to reach a staggering £488.5bn (€565bn) by the end of 2023.

Co-working hotels are attempting to cater for the needs of Bleisurites. British hospitality group Birch opened suburban retreat Birch Selsdon in 2023. Nestled in 200 acres of one of London's rewilding projects, the property boasts ample working space, creative studios and an outdoor co-working hub where guests can enjoy work and nature.

Beyond designated destinations, this shift signals an opportunity for typically business-focused hotels and hospitality spaces to extend their offerings to accommodate facilities that cater for families, experiences and leisure time.

Blended travel means hoteliers need to rethink their hotel's programming and guest facilities as a guest pivots from the business purpose of their trip to the leisure purpose of their trip in an instant. This influences the hours of operation, staffing levels and the guest experience for hotel food and beverage outlets, menu offerings, fitness centres and spas - requiring hotels to become chameleons to cater for guests' shifting needs during their stay.

'Travellers are now taking the opportunity to experience the destinations that they're travelling to on business,'

Agrees Marriott Bonvoy's Neal Jones.

'Historically, they may have taken the point of view of getting into the destination, doing the business and leaving as soon as possible to get back to their home destination. But now, they're bolting on an extra day or two, or in some cases even longer or flying out their families to be with them as part of the trip.'

It's a move that chimes with emerging travel needs, in the Middle Eastern regions in particular, where research from Marriott Bonvoy highlights that family-friendly accommodation ranks highly for over half (53%) of respondents in Saudi Arabia and is ranked as the number one factor for those in the UAE (55%).



KEY CONSUMER VALUE :

Tech-Enhanced Experiences

Tech integration is taking root across industries as consumers look to innovations that optimise their encounters with brands, spaces and experiences. In the travel sector, guests are looking for tech that delivers tailored services and bespoke interactions – allowing various touchpoints to inform customer preferences and behaviours.

It's a motive important to luxury consumers. Enjoying a bespoke experience ranks highly for half of high-earning travellers in the UAE (50%) and Saudi Arabia (51%), while those aged 18–24 across Europe and the Middle East rank the personalisation afforded by luxury hotels and resorts second after rewards and added-value experiences.

Technology will address these needs across destinations.

‘Hospitality spaces of the future will make travellers feel like they’re staying in rooms that have been designed with only them in mind,’

Explains The Future Laboratory co-founder Martin Raymond.

‘That’s where tech will enhance the future of travel, not through gimmicks, but through subtle integrations, efficiencies and intuitive offerings – most of which guests won’t need to know about.’

It’s a fact reflected in travellers’ streamlined approach to tech and tools, where Marriott Bonvoy research respondents across regions list a one-stop-shop app for finding and booking holidays, as well as exploring the destination once they’ve arrived, as key. Travellers in Spain (32%), the UK (30%) and the UAE (40%) rank this option as number one.

In response, travel brands will use the power of AI to drive optimisation and personalisation, allowing travellers to redesign spaces, experiences and itineraries that reflect their needs and expectations. Here, we explore these developments in two trends: *Sentient Spaces* and *AI Explorations*.



Sentient Spaces

Enabled by AI and biometric technology, future hospitality spaces will be able to respond and cater for guests' needs in real time, creating spaces that recognise their mood, schedule or even health requirements, and alter lighting, temperature, sound and air settings accordingly.

Consumers' routines are increasingly in sync with their smart devices, laying the groundwork for a future where seamless hyper-personalisation is endemic. According to Cisco, the number of connected Internet of Things (IoT) devices worldwide will reach 500bn by 2030, about 59 times more than the expected 8.5bn people that will make up the world's population, according to the UN.

With travel firmly categorised as a vital tenet of healthy living, guests will expect the places and spaces they occupy to optimise their wellbeing, from air sensors that respond to the quality of the outside environment to room features that synchronise with the emotional and health requirements of guests.

Mediated Atmosphere, a project by the Responsive Environments group at the MIT Media Lab, is already pointing to this kind of reality. The prototype uses modular, real-time control infrastructure combined with bio-signal sensors to track heart rates and facial expressions, allowing the creation of immersive environments through controllable lighting, projection and sound designed to help users work and play to their own specific needs and wants.

'Deep personalisation will prove key to how future hotel rooms are designed,'

Says Rohit Talwar, futurist and CEO of Fast Future.

'It will have clear benefits, not just for the guest experience, but for back-end efficiencies too, understanding intrinsically what people want and need, and what they don't.'

As we look to the future, pick-up-and-go pre-settings across entire hotel groups and partners will allow guests to seamlessly plug in their room preferences in destinations across the world, with smart devices acting as the digital concierge for their needs. From calendars that synch with speakers and lighting to mattresses that respond to core body temperatures or health conditions – hospitality innovators will create spaces that give guests what they want and what they need.



AI Explorations

Advances in machine learning technologies will bring all new efficiencies and experiences to the travel sector, creating intuitive offerings that understand and optimise travellers' schedules.

Despite its relative infancy, consumers are beginning to harness the efficiencies afforded by public-facing AI tools. According to research by Marriott Bonvoy, in the Middle East, about half of respondents in the UAE (52%) and Saudi Arabia (50%) have used AI to help them research or plan a holiday, while over three quarters (77%) of travellers in both countries say they are likely to do so in the future.

Notably, where users did use AI, more than nine in 10 respondents across territories in the UK (93%), France (92%), the UAE (95%) and Saudi Arabia (95%) noticed its influence on their travel – listing location, accommodation and transport among the affected elements.

Travel platforms are using AI to take the hassle and guesswork out of trip planning and itinerary generation. Journey Genie considers user factors such as interests, travel dates and budget to create optimised itineraries, suggesting the best routes and providing real-time travel information to make journeys seamless.

Similarly, GuideGeek harnesses the collective knowledge of the entire internet to give tailored travel advice. Users simply tell GuideGeek where they are looking to travel, and it will instantly advise on where to stay, where to eat, destination secrets and how to get the most out of their trip.

Beyond planning idyllic experiences, AI will prove vital to solving practical issues too – transforming trip and transport bugbears for travellers and providers. As Rohit Talwar notes: ‘A big differentiator for travel brands in the AI space will be those that use it to give customers more information and to help customers deal with disruption – rather than unnecessary gimmicks.’

Parametric travel insurance is one solution. In 2023, Assurant Japan joined forces with Blink Parametric, a flight interruption insurance solutions provider, to introduce the technology in Japan. This solution is designed to address common issues travellers face, such as flight delays, cancellations and lost baggage, using pre-set trigger events to quickly notify customers of problems and provide solutions. The technology can be seamlessly incorporated into travel companies’ platforms or portals and added to existing services to provide new value to customers.

For The Future Laboratory’s Martin Raymond, it’s here where AI demonstrates its transformative possibilities.

‘Despite increasing adoption, not every traveller will want to use AI to plan their trip, but they will always want to avoid disruption, delays and cancellations,’

He explains.

‘It’s why travel and hospitality brands must take the mantle, and actively create better experiences for their guests using the technologies that are available.’



PART THREE:

Conclusion

The industry's buoyancy across Europe and the Middle East, consumers are reclaiming and reframing travel in their own world view. With travel increasingly seen as a core tenet of a happy, healthy and meaningful life, individuals are seeking places and spaces that understand who they are, offering experiences that match their values and also provide value, particularly in uncertain economic times.

It may be a key consideration, but the industry's buoyancy shows that rather than cutting back, travellers are just switching tack. As Marriott Bonvoy's Neal Jones explains: 'The expectation is that travellers would squeeze on their expenditure when it comes to hotel spending and travel generally. Instead, the travellers of today have re-prioritised their individual budgets to ensure that they can deliver on their own expectations. It's probably one of the last, if not the last area, where people are choosing to cut back. Because of what travel means to people, there's been a seismic shift in people's thought processes and prioritisation of funds – it's why the future of the industry is so upbeat.'

Consumers – across demographics and regions – are still spending on travel, but the significance of these experiences is growing, with brands tasked with exceeding expectations to provide value beyond checkout.

How Will The Industry Adapt?

In this report, we've uncovered a human-first approach to redefining travel experiences – outlining five key pillars central to future travellers' needs. These pillars provide a blueprint for understanding how, why and where consumers want to travel, and crucially, what they expect from brands to facilitate that journey.

The future of travel may look different across regions, demographics and cohorts, but overlapping needs, values and behaviours highlight how future travel will:

Redefine luxury to immersive
travellers in authenticity and exclusivity

Reframe sustainable travel, not just
as responsible, but as wholly rewarding

Promote travel as a vital
contribution to individual wellbeing

Ensure places, spaces and experiences are
inclusive and remain within consumers' reach

Drive personalisation and
optimisation through new technologies



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