



TOMORROW'S TRAVELLERS: **HOSPITALITY TRENDS FOR 2042**

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30 years ago I founded Clockwork Marketing to help hotels and hospitality businesses use new technology to build better customer loyalty and attract new guests. Property management systems held a depth of data that wasn't exploited at the time.

The growth of Clockwork Marketing has paralleled the growth in data-driven, evaluation-based marketing. But Clockwork isn't just about data; our creative marketing campaigns appeal to guests' emotional desires and their need for travel – human impulses.

To explore the behaviour and motivation of future guests, Clockwork has worked with futurist, Will Higham, to develop the following trends report so you can futureproof your business.

While existing and new technology will be ubiquitous, a human approach to any guest experience in hospitality will be more important than ever. Research included in the report highlights that people will be prepared to pay more for a better customer experience.

30 years ago the human approach to hospitality was as important as it is today, or will be tomorrow, because we are in the business of hospitality and experience is everything.

Clare Bushby

Clare Bushby, Managing Director



TECHNOLOGY WILL BE UBIQUITOUS BUT CUSTOMER EXPERIENCE WILL BE KEY



Travellers will have very different expectations for their holiday experience in 20 years' time. They are likely to be 'techy-traditionalists.' They'll want the ease and convenience that only new technologies can bring: from automatic check-ins to bathroom smart mirrors. But they'll also demand 'old fashioned' levels of personal – and personalised – service. They'll expect everything from their flights and rooms to their meals to be customisable. They will want to know that their experiences are good for their own physical and mental health – and for the health of the planet. And they'll seek out holidays that help them meet and spend time with 'people like me'.

The future offers both risks and opportunities for the leisure industry. Consumers have adopted new technologies faster than most hotels and venues have, and this needs to change if venues are to attract tomorrow's tourists. Customers will have higher expectations. And the technology required to fulfil them won't be cheap.

But for those companies that do adapt to these new demands, the future looks hugely positive. All the trends and statistics we've seen suggest that leisure experiences will become an even bigger part of people's diaries – and wallets – in future. And they'll pay a premium to get just what they want. Great news for companies that can provide the combination of high tech and high touch that tomorrow's travellers will demand.

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TREND 1:

TRAVEL EASY



TREND 1: TRAVEL EASY

For the last 20 years, the main driving force for technological innovation has been peer communication: inspiring text and app messaging, social media, video sharing platforms and video-calling. But this is about to change. In future, convenience will be key.

Tomorrow's world will be even more complex than today. With more technology, more options, and people trying to cram more experiences into less free time. Consumers will demand new technologies that speed up any administrative tasks. As a result, the focus of innovation will shift from improving communications to developing time- and labour-saving devices. By the 2040s, the smoothness of our travel will make today's holidays feel clunky in comparison. Compare it to how we now look back at the internet of the 1990s.

Machine to machine communication – the Internet of Things – will play a key role here. When tomorrow's travellers arrive in a hotel, transport hub or leisure venue, their personal devices will immediately synchronise with the devices in that space. There'll be no need for check-in, as the hotel's tech will register guests' arrival. Guests will be sent their room numbers in advance, and a retinal scan will allow them access to their hotel, lift and room. The minute they set foot in their hotel suite, the heating, lighting, music and, yes, scent will automatically adapt to their personal preferences. They'll automatically be let into those facilities they've paid for in advance: and pay with a single gesture for those they haven't. They might not even need to bring as much luggage: with 3D printers able to manufacture whatever they've forgotten.



MORE TECHNOLOGY, MORE OPTIONS, MORE EXPERIENCES, LESS TIME

TREND 1:

TRAVEL EASY

As smart appliances start to dominate our homes, consumers will demand them wherever they go. Smart mirrors that make style suggestions. Heating and cooling systems that self-adjust based on heat sensors. Devices that automatically send requests for room service or additional towels, removing the need for room phones or even apps.

These appliances will typically be voice and gesture driven. Already over 39% of UK adults owned a voice assistant in 2021: up from 31% at the beginning of 2020, with sales seeing a massive 25% growth during lockdown.¹ Smart speakers may struggle in public, where background noise and visuals can impair them. But in more private spaces like homes and hotel rooms, they'll become the most common way to turn on TV, change room temperature or order room service.

For travellers, such developments can't come soon enough. Already, 88% say they would happily ditch traditional room keys in favour of facial recognition room access. 81% would expect augmented reality in the room to talk face-to-face with friends and family. And 79% want predictive room service.²

APPLIANCES WILL TYPICALLY BE VOICE AND GESTURE DRIVEN



¹Voicebot Research, Jun 2021

²HospitalityNet, Dec 2019

A modern interior space featuring green upholstered armchairs with dark frames and three round, dark-colored tables with thin legs. The room has large windows looking out onto a courtyard with white outdoor furniture. A large dark blue circle with white text is overlaid on the right side of the image. The floor is covered with a textured rug, and there are large glass pendant lights hanging from the ceiling.

**THE FOCUS OF
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TREND 2:

IMMERSE YOURSELF



TREND 2:

IMMERSE YOURSELF


Many of tomorrow's biggest travel trends will use immersive technology. For instance, the interior of their plane or train carriage might display calming scenes on video walls. Perhaps a real time view of the clouds outside during the day; shifting to a cosy, luxury bedroom scene at night. Their eye mask will be a pair of smart glasses that lets them lose themselves in whatever they want: from the latest film to a three-hour forest bathing experience.

On entering their hotel room, guests will be able to change the lighting and wall colours with just a nod. Technology-inlaid glass walls will display whatever scene they wish: switching from Cornish seascape to African savannah as easily as we now swap backgrounds on a Zoom call. Hotels will also be able to switch themes throughout corridors and hallways: using not just visual effects but audio- and scent-based ones. Imagine an interactive, Virtual or Augmented Reality Star Wars themed hotel in Las Vegas. Or maybe a Las Vegas themed hotel in the Cotswolds?

Restaurants will offer immersive video-booths that enable customers to dine in any visual environment they want. Mexican food in an imaginary cantina, or Korean food in virtual downtown Seoul. Wedding venues could charge a premium for such a service.

IMMERSIVE DISPLAYS WILL OFFER ANY VISUAL ENVIRONMENT GUESTS DESIRE





**GUESTS WILL BE ABLE TO
CHANGE WALL COLOURS
WITH A NOD**

TREND 3:

HAVE IT YOUR WAY



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HAVE IT YOUR WAY

Consumers are already getting accustomed to personalisation as standard: from online retail profiles to TV streaming services. By 2042 they're likely to want their entire holiday to be tailored to their individual needs.

We can expect people's attitudes to personal information-sharing to relax in coming years, as they appreciate the conveniences this affords and gain greater control over their data. By 2042, all travellers will have a virtual guest profile, a little like their health records. In it they'll store and control their preferences.

CONSUMERS ARE GETTING ACCUSTOMED TO PERSONALISATION

Venues will offer rooms, restaurants and gyms that can be customised in advance to guests' tastes and health goals.

Restaurants will cook food to their specific requirements, based on the feed from their health wearables or - as the technology improves - from DNA analysis. People's nutritional requirements are going to become increasingly complex as their choices widen, but that won't be a problem. Ahead of guests' arrival, their diet will be assessed, and an appropriate menu created.



TREND 3:

HAVE IT YOUR WAY

Travellers will want rooms to adjust to their shape and composition too. Whether they're looking for something airy or intimate; a relaxing family room or an efficient workstation. Hotels will build in more moveable walls and adaptable furniture. In time, as new construction materials and high-end 3D printing are introduced, hotels will become even more adaptable. The whole building might grow or shrink to cater to shifting demand, reducing wasted space. Or, if built on floating platforms in the sea – as some hoteliers are envisioning – hotels could even move location if required.


Personalisation will also provide time-saving opportunities for hotels and other leisure venues. For instance, using Artificial Intelligence (AI) to link guest profiles to their own CRM system will allow venues to prepare for individual visitors quickly, efficiently – and personally. Based on people's travel and restaurant history, systems will automatically provide ancillary staff with room and pillow preferences; suggest a guest's favourite cocktail to the bartender; and enable concierges to quickly recommend personalised trips.

Another key part of the trend is consumers' growing appetite for deeper involvement with the services they use. Micro-investment platforms are growing ever bigger, with \$6bn invested in Kickstarter alone.³ In future, some hotel owners will take their loyalty programmes a step further, giving guests the chance to 'put their money where their mouth is' and invest in the hotel via one of these platforms. In exchange, investors will receive a share of future profits and a reduced rate next time they stay.



PERSONALISATION WILL PROVIDE TIME-SAVING OPPORTUNITIES

³ Kickstarter Jul 2021

A close-up photograph of a golden-brown waffle served on a blue and white patterned plate. The waffle is topped with a dollop of white cream, fresh strawberries, blueberries, and a sprinkle of brown sugar or granola. In the background, there are other plates with food, including what looks like a slice of salmon and more fruit, and a white mug. A silver fork is visible in the bottom right corner. A dark blue circular graphic with a white border is overlaid on the bottom left, containing white text.

**BY 2042 GUESTS WILL
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HOLIDAY TO BE TAILORED
TO THEIR INDIVIDUAL NEEDS**

TREND 4:

WORLD OF WELLBEING



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WORLD OF WELLBEING

Post-Covid - and any other future pandemics - guests will of course expect every hotel to provide high-end health and safety. Increasingly, this will be technology-led. For instance, guest towels with nano coatings that repel germs. As high-end hygiene becomes standard, how will hotels differentiate themselves around the increasingly important health issue? By turning their venues into all-round wellness environments.

Consumers are becoming increasingly self-sufficient health-wise. 70% of Britons now research their symptoms online and treat themselves for minor health issues.⁴ 34% of global consumers owned a wearable device in 2021, compared to just 19% in 2017.⁵ All figures which will rise further as public healthcare funding declines.

As a result, tomorrow's hotels and restaurants will need to install systems that communicate with guests' wearables. As well as providing information about diet and allergies, it'll help hotels maintain the perfect environment for guests' wellbeing. For instance, should the lights be lower? Will they need a quiet corner of the restaurant? Meanwhile rooms will feature smart toilets, toothbrushes and pillows that let guests further monitor their health.



⁴ OnePoll, Jan 2018
⁵ Bulbshare, Sep 2021

TREND 4:


WORLD OF WELLBEING



SERVICES WILL FOCUS ON MENTAL, AS WELL AS PHYSICAL WELLBEING

Tomorrow's guests will expect tech-led gym and spa facilities as standard. Interactive devices will lead the experience, alongside personal trainers – real and virtual – and DNA-driven personalised workouts. Guests will also want room-based workout and spa facilities. These will use interactive walls and mirrors: updating and standardising what companies like Peloton offer today.

Other services will focus on mental as well as physical wellbeing. The smartest hotels will ensure all their public spaces offer guests the healthiest, most relaxing lighting and air quality, alongside natural, calming sounds, and neuro-enhanced aromas. Sleep quality too will be key. In future, guests will receive sleep-improving audio feeds and aromas. With neuro-technology advancing rapidly, hotels might one day even offer guests a menu of cues for their dreams.

A photograph of a modern hotel courtyard. The floor is paved with light-colored square tiles in a checkered pattern. Several round white tables with green wicker chairs are arranged throughout the space. Large potted plants, including palm trees and broad-leafed tropical foliage, are placed around the courtyard. The background shows a building with large windows and a green wall. A dark blue circular graphic with a white border is overlaid on the left side of the image, containing white text.

**THE SMARTEST HOTELS WILL
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TREND 5: **HERE TO HELP**



TREND 5:

HERE TO HELP

No matter how important technology becomes, history has proved that people will always value the human approach. Even those in the most tech-led sections of society. For instance, 63% of Gen Z say they prefer shopping in real life than online.⁶ Indeed, the more technology encroaches on our lives, the more important the 'human touch' will become. Already 81% of Europeans say they'd happily pay more for a better customer experience.⁷ Tomorrow's travellers are likely to pay an increasing premium for personal service.

APPLIANCES WILL TYPICALLY BE VOICE AND GESTURE DRIVEN



With visitors demanding assistance wherever they go, every employee will need to be a mini-concierge or Maitre D', no matter their 'day job'. They'll be expected to answer questions not just about hotel basics but local history and memorable excursions. Again, this will be achieved by combining human and machine. For example, adopting technologies that deliver automated personalisation will enable employees to spend less time on administration and more on interacting with guests. Employees will also be able to augment their own personal knowledge with the venue's databases, via unobtrusive AI-earphones or Augmented Reality contact lenses.

All this will bring guests and hotel staff closer together on a human level. Something that evidence increasingly shows leads to greater customer loyalty.

⁶ Retail Week, Jan 2019

⁷ CapGemini, Mar 2020

A modern lounge interior featuring a curved wall made of vertical wooden slats. The room is furnished with orange sofas, patterned armchairs, and a large black planter with a green plant. The floor is made of light-colored stone tiles. A large dark blue circle with a white border is overlaid on the right side of the image, containing white text.

**THE MORE TECHNOLOGY
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THE MORE IMPORTANT THE
'HUMAN TOUCH' WILL BECOME.
ALREADY 81% OF EUROPEANS
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EXPERIENCE**

TREND 6:

COMMUNITY SPIRIT



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COMMUNITY SPIRIT

The rising demand for human contact will drive another hospitality trend: the desire to feel part of a community.

As trust in the media, government and big business continues to crumble, people will place greater value on friends, family, neighbours – and fellow customers and travellers, already 97% of consumers use customer reviews before every major purchase.⁸ And more and more are enjoying the company of their peers via competitive leisure, supper clubs, food and street festivals. Even Buddymoos: bringing your friends with you on your honeymoon.

Tomorrow's travellers will want holidays that let them meet and socialise with 'people like me'. We'll see a revival of communal package tours, and even more community focus on flights and cruises. Tour operators and hotels will encourage this by embedding socialising – and social media – opportunities everywhere within the holiday experience.

Community will also be important when it comes to documenting holiday experiences. Every venue will be optimised for taking and sharing real time photo and video feeds. And will create shareable social pages, for whatever social media platforms are most popular in the 2040.



A close-up photograph of two hands holding glasses of beer. The hand on the left has red nail polish, and the hand on the right is wearing a blue sleeve. The glasses are filled with a golden beer and have a thick head of white foam. In the background, there is a green plant with small leaves and a small glass jar. A dark blue circular graphic with a white border is overlaid on the bottom left of the image.

**THE RISING DEMAND FOR
HUMAN CONTACT WILL
DRIVE THE DESIRE TO FEEL
PART OF A COMMUNITY**

TREND 7:

DO THE RIGHT THING



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DO THE RIGHT THING

Scientists predict global warming will have an increasing personal impact on human lives over the next 20 years. Climates will shift, and some popular travel destinations could become no-go zones. As a result, sustainability will become a genuine need for many businesses, not just something to attract conscientious travellers. This will give a further boost to what is already an important factor. 83% of today's global travellers consider sustainability a key part of travel.⁹ This will grow, as travellers increasingly see sustainability as 'need to have' not just nice to have.

With consumers wary of the damage done by long haul flights, but unwilling to give up long distance travel, 2040's most popular airlines will be those that use sustainable fuel. Many trains and cruise ships will run on green fuels too. And tomorrow's guests will want to know that any new hotel they stay in was built with minimal impact on the surrounding environment, using sustainable building materials. Restaurant kitchen gardens will start as a selling point and quickly become an expectation. Equally necessary will be smart systems to recycle and reduce waste; with in-room green spaces to offset the hotel's carbon footprint.


SUSTAINABILITY AS 'NEED TO HAVE' NOT JUST NICE TO HAVE

A circular inset image showing a woman from behind, wearing a grey sweater and a black backpack with brown straps. She is holding a smartphone up to take a photo of a city skyline with tall buildings under a clear sky.

Consumer fears around food miles and carbon footprints will combine with the Community Spirit trend (6), to drive a demand for hyper locality. Not only will many travellers favour local holidays. They will also want hotels to use local suppliers for their food and laundry, perhaps even their furniture and device manufacture.

Locality will provide opportunities for hospitality businesses that can show how they're supporting the working community around them. This chimes well with travellers' growing desire to feel more personally involved with their holiday experiences. For instance, a pop-up from a local bakery will add kudos at hotel breakfasts. So too will rooms dedicated to local business use, or exhibitions or seminars from local artisans and writers.

⁹ The Vacationer, March 2022



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SUSTAINABILITY AS 'NEED TO
HAVE' NOT JUST NICE TO HAVE**

WHEREVER YOU'RE GOING...

WE'RE HERE FOR YOU.

"A smooth sea never made a good sailor" and experience is what counts. With 30 years in the sector, Clockwork Marketing's marketing specialists live and breathe hospitality.

Many of our employees have worked in hospitality, and day in, day out we collaborate with business owners and managers to create marketing campaigns that boost bookings.

This experience enables us to talk the same language and understand your business in a way only insiders can. Our specialist expertise will give your hotel marketing an edge. That x-factor which captures the imagination of new guests.

Successful marketing is both an art and a science. With raw creativity, backed by data, we evoke your potential guests' travel dreams - lighting up desire for your business, making booking effortless, whilst saving you time and money.

Whether you need managed marketing services, stand-out individual marketing campaigns, a mobile-first website, creative branding, or impactful design, we've got you covered. Whatever your marketing needs, you can say goodbye to all your marketing stress with Clockwork Marketing.

We've been colouring travel dreams and boosting bookings since '92.



CLOCKWORK MARKETING. 30 YEARS HOSPITALITY INSIDERS.

**A SMOOTH SEA NEVER
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ABOUT THE AUTHOR

WILL HIGHAM

Will Higham is a Behavioural Futurist and global authority on Innovation and Strategy. He predicts what your customers and employees will think, do and demand in future. He helps clients – from Amazon to Vodafone – identify the best strategies to reach them. Will's led popular strategic consultancy Next Big Thing for the last 20 years. He is the man who warned the drinks industry of the New Sobriety; saw the Wellbeing Consumer coming a mile off; and championed 'Strictly Come Dancing' ('Dancing with The Stars') to the BBC. He appears on Netflix's new documentary series 'The Future Of'.

Will wrote the first practical handbook for UK trend strategists: 'The Next Big Thing: Forecasting Consumer Trends For Profit' (Kogan Page, 2009), which has since been translated into five languages. He's been interviewed across media: BBC to Bloomberg TV, Fast Company to The Times. He has presented a TV show for CNBC, and written for The Economist, Advertising Age and Huffington Post. He's taken part in academic programmes like Cambridge University Open Innovation Forum and been a judge on prestigious panels like WARC and IoD innovation awards.

By continually researching the latest shifts in consumer tastes, advances in technology, financial futures and changes in media and channel use, William builds a picture of what the needs, expectations and behaviours of tomorrow's consumer are likely to be. He then offers strategic and tactical advice on how to appeal to those needs. And reveals the key issues an organisation will face in the coming years: shifting audience composition to unlikely challenger brands, new purchase channels to evolving employee demands.



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