

hotel
2030

Emerging Trends



Hotel 2030 – Emerging Trends

As the pace of change across sectors continues to accelerate, many in and around the hospitality industry are asking questions about emerging shifts that could have future impact.

Hotel 2030 is a cross-sector platform that aims to act as a catalyst for open discussion on the possible changes facing the hospitality industry as well as associated innovation opportunities for hotels over the next 15 to 20 years.

- This initial view of emerging trends has been compiled from a mix of existing research, reports, surveys and opinions about the future authored by a wide range of companies, consultants and academics in and around the sector.
- These are starting points for multiple conversations, both online and face-to-face, that will debate how change will probably occur and in what areas; will gain a wider, more informed view on the potential future and will stimulate new thinking on the role, design and opportunities for hotels and related businesses over the years to come.

The front of each of the cards in this pack includes a title, brief description and visual image

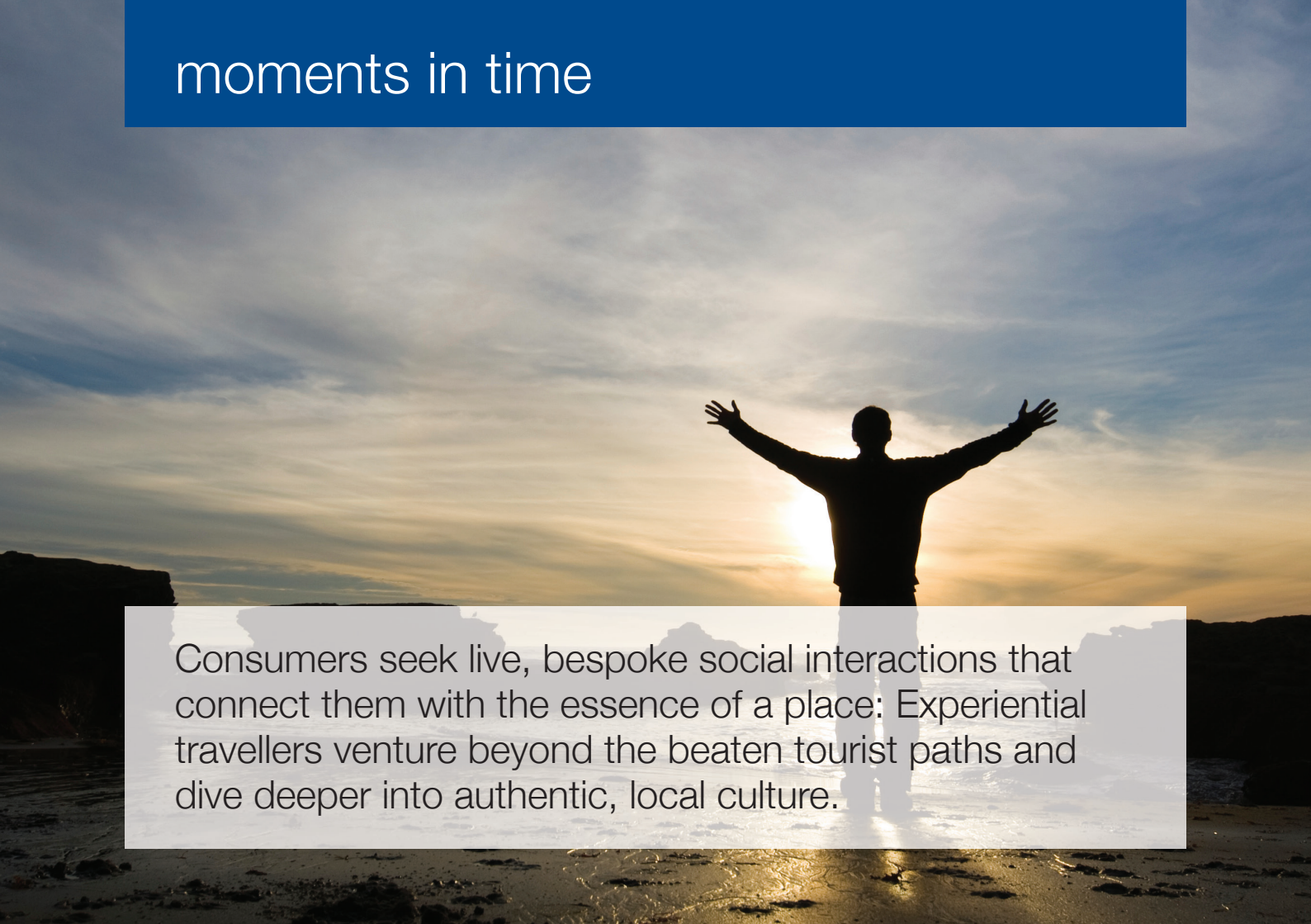
The back of each card provides more information on ‘Signals from Today’ and ‘Future Impacts’

These cards are important, but not as important as the discussions they provoke, the opportunities that they can identify and the decisions that they may inspire.

To add views into the mix [@hotel2030](#)

To discuss the Hotel 2030 project contact tim.jones@hotel2030.org

moments in time

A silhouette of a person standing on a beach with their arms raised in a 'V' shape, facing a bright sunset over the ocean. The sun is low on the horizon, creating a golden glow in the sky and reflecting on the wet sand. The person's shadow is cast on the sand in front of them.

Consumers seek live, bespoke social interactions that connect them with the essence of a place: Experiential travellers venture beyond the beaten tourist paths and dive deeper into authentic, local culture.

moments in time



Consumers seek live, bespoke social interactions that connect them with the essence of a place: Experiential travellers venture beyond the beaten tourist paths and dive deeper into authentic, local culture.

Signals from Today:

- Consumers revel in opportunities brought by growing prosperity and access. They seek to channel their enthusiasm into new and novel experiences.
- Abercrombie and Kent says that more trips are being planned around once-in-a-lifetime events.
- The growth of Secret Cinema is linked to a rising desire for enriching experiences in the form of chance, mystery and randomness as a response to a more predictable world.

Future Impacts:

- Travel will increasingly be about depth rather than breadth of experience, as we experience places collaboratively.
- Technology enhances travel by layering information about history and culture over physical locations, enriching the subjective experience of travel.
- Boomers are more confident travellers than past generations and are searching for more “off the beaten track,” and authentic travel experiences.
- Rising affluence in emerging markets results in shifting to desire for “experiences”.

health camps

The background of the slide features a stack of three smooth, dark grey stones resting on a dark bamboo mat. To the left, there are several vibrant green bamboo leaves. The overall background is a soft, out-of-focus green.

Pervasive wellness gives rise to the development of new hotels and other operations specializing in weight loss and total wellness designed to transform you during and after your stay.

health camps



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Signals from Today:

- As the concept of health broadens to include overall wellbeing, health as the centre of a holiday experience becomes more desirable.
- Established hotel chains are re-branding around wellness, recognising that the concept is richer than simply focussing on fitness.
- Services are being developed to have lifestyle appeal, not just specific functional benefits.
- India has seen 22% annual growth in wellness tourism.

Future Impacts:

- US demand for health and wellness services in the workplace is projected to grow steadily.
- India's health and wellness tourism is expected to generate revenues of INR320bn in 2016, after increasing at a growth rate of 25.6% over the next 4 years.
- Non-religious spiritual practices continues to grow around the world, in the form of spiritual pilgrimages, retreats and workshops.

sanctuary and refuge

A woman with dark hair tied back is sleeping peacefully in a bed. She is wearing a white tank top and is covered with white linens. Her eyes are closed, and she has a serene expression. The background is a plain, light-colored wall.

Time pressures and an increasingly complex, interconnected world mean consumers search for more accessible places where they can escape and relax in safety away from the stresses of the day to day.

sanctuary and refuge



Time pressures and an increasingly complex, interconnected world mean consumers search for more accessible places where they can escape and relax in safety away from the stresses of the day to day.

Signals from Today:

- Consumers globally agree that they find it hard to find space in their lives to think, reflect and switch off from everyday pressures and stresses.
- Lake Placid Lodge's "check in check out package" provides a tech-free experience. Guests leave devices at the front desk and the in room entertainment is the fireplace.
- Thailand is the world's most popular spa destination with nearly 4m international visitors arriving pa.

Future Impacts:

- As luxury is a function of scarcity, the children of tomorrow will crave nothing more than freedom, if only for a short while, from all the blinking machines, streaming videos and scrolling headlines that leave them feeling empty and too full all at once.
- Stress is on the rise, and so is the market to help consumers, employees and workplaces combat this health problem.

assisted living



For wealthier over 70s, hotels will become an increasingly attractive option for electronically assisted long-stay living as a buffer between the post-retirement and pre-nursing home life stages.

assisted living



For wealthier over 70s, hotels will become an increasingly attractive option for electronically assisted long-stay living as a buffer between the post-retirement and pre-nursing home life stages.


Signals from Today:

- It is estimated that people aged over 60 currently hold more than 50% of the wealth in developed societies, with a similar trend occurring in emerging countries.
- Assisted living developed as a residential alternative to nursing home care and is considered the fastest growing long-term care option for seniors because of its emphasis on resident choice, dignity, independence and privacy.
- In 2012, the average amount being paid per month in the US for assisted living was approximately \$3,600.

Future Impacts:

- The 85-year-old plus population is projected to increase 351% between 2010 and 2050.
- By the middle of this century, there could be 100 million Chinese over the age of 80.
- The number of Americans who reside in senior care facilities is expected to almost double by 2030.
- By 2030 UK life expectancy will, on current trends, increase by 4.2 years, but healthy life will increase by only 2.6 years. As a result demand for social care will increase by 44%.

temporary migrants

A person wearing a white long-sleeved shirt and dark trousers is walking on a paved surface. They are carrying a large, light-colored sack or bag on their back. The pavement consists of grey and red tiles with a circular pattern. The person is walking away from the camera, and their shadow is cast on the ground.

Over 500m more migrants will require temporary medium-term accommodation in predictable locations, and will provide many organizations with an additional source of human resource.

temporary migrants



Over 500m more migrants will require temporary medium-term accommodation in predictable locations, and will provide many organizations with an additional source of human resource.


Signals from Today:

- There is more international and intra-national migration than ever as many hope for better economic prospects.
- Seasonal workers, mainly in agriculture, continue to be the single most important group of temporary worker migrants in the OECD.
- Gulf states are distinguished by their very high reliance upon temporary migrant labour, with around 70% from SE Asia.
- There are more than 1m long term temporary migrants in Australia: almost five per cent of the total population.

Future Impacts:

- If the ability to move globally continues, migration will increase exponentially driven partly by 'pull' factors (e.g. need for workers) and 'push' factors (e.g. civil unrest, poverty).
- Demographic dynamics mean temporary migration will continue in the future, despite the global economic upheaval.
- Immigrants may provide half the growth in the US labour force through to 2030.
- By 2025 China's cities will add 325m more people, including about 230m migrants.

multi-party travel

A large, diverse group of people of various ages and ethnicities smiling for a group photo. The group includes men, women, and a child, representing multiple generations and backgrounds. They are dressed in casual to semi-formal attire. The background shows an indoor setting with glass doors and a modern interior.

Larger numbers elect to travel collectively in parties including multiple generations of families as well mixed groups of friends and families looking for experiences that keep everyone happy.

multi-party travel



Larger numbers elect to travel collectively in parties including multiple generations of families as well mixed groups of friends and families looking for experiences that keep everyone happy.

Signals from Today:

- Group travel is on the rise: An operator specialising in Spanish holidays said that last summer bookings for parties of five or more surged by over 11% compared to the previous year.
- As grandparents have more leisure time and parents lead increasingly complicated lives, grandparents and grandchildren are holidaying together.
- 30% of US leisure travellers who are grandparents have taken at least one vacation with their grandchildren.
- Brazilians often travel in groups of up to 20 extended family members, ending up renting an entire hotel floor.

Future Impacts:

- Households are becoming increasingly diverse thanks to a fragmentation of the traditional family unit, the rise in levels of divorce, more single-parent families and increased multi-generational co-habitation.
- Multi-generational travel is a growth market among travellers from emerging countries especially in outbound family travel from India.
- Norwegian Cruise Lines reported that on any one cruise between 15% and 20% of travellers on board are part of a multi-generational group.

new forms of ownership

The image features four stylized human figures in a row, holding hands. From left to right, they are colored red, orange, green, and blue. They are positioned against a white background with a dark blue banner at the top. The figures are simple, flat shapes with circular heads and rectangular bodies. The banner at the top contains the text 'new forms of ownership' in white, lowercase letters.

Traditional franchising and direct ownership relationships gives ground to shared co-operatives, partnerships and guest / membership funding, challenging traditional business models and money flows.

new forms of ownership



Traditional franchising and direct ownership relationships gives ground to shared co-operatives, partnerships and guest / membership funding, challenging traditional business models and money flows.

Signals from Today:

- As we see more interest in temporary access and leasing the concept of ownership and what you do with the 'stuff' you own is becoming increasingly fluid and diverse.
- The worldwide hotel industry now has occupancy rates substantially lower than shared vacation ownership properties.
- As a result of uncertain incomes and house prices, younger home-buyers are leading the co-buying property trend.

Future Impacts:

- Crowd-funding is set to be an important dynamic in the industry with growth rates of over 60% per year in terms of the total amount of funds raised.
- European car-sharing membership is forecast to reach 15 million by 2020.
- New combinations of hotel co-funding between investors, existing owners and local stakeholders are being regularly proposed.

emerging market travellers

A photograph of a man with short dark hair and a goatee, wearing a dark suit, white shirt, and blue tie. He is sitting on a carpeted staircase, leaning back with his right hand resting against his cheek. He is smiling slightly and looking towards the camera. The background shows the steps of the staircase and a white wall.

Another billion plus middle class in Asia and Latin America as well as many parts of Africa are newly mobile and require accessible hotel accommodation for both work and leisure.

emerging market travellers



Another billion plus middle class in Asia and Latin America as well as many parts of Africa are newly mobile and require accessible hotel accommodation for both work and leisure.

Signals from Today:

- Brazil's growing middle class currently accounts for 52% of the total population of the country.
- The Chinese middle class is estimated to be more than 300m.
- Currently slightly more than two-thirds of all international travel in China is to Hong Kong or Macau, but Chinese tourists are increasingly venturing to other parts of Asia and long haul destinations such as Europe.

Future Impacts:

- By 2030 the global middle class will more than double in size, from 2bn today to around 5bn.
- International travel is still relatively young in China, but is forecast to grow by 17% per year over the next decade.
- By 2020 a quarter of all international travelers arriving in Japan and South Korea will come from China, while arrivals from China in Europe will quadruple.
- In North America, Chinese travelers will rank third among international arrivals.

augmented reality

776 cubic m

ment For Rent

19.8 meters

Advertisement



Bar

Entrance

Water Line

Fire Hydrant

Co

Rack

The role of virtual environments in our daily lives blurs with the physical and consumers cease to distinguish between these in the products and services that they consume.

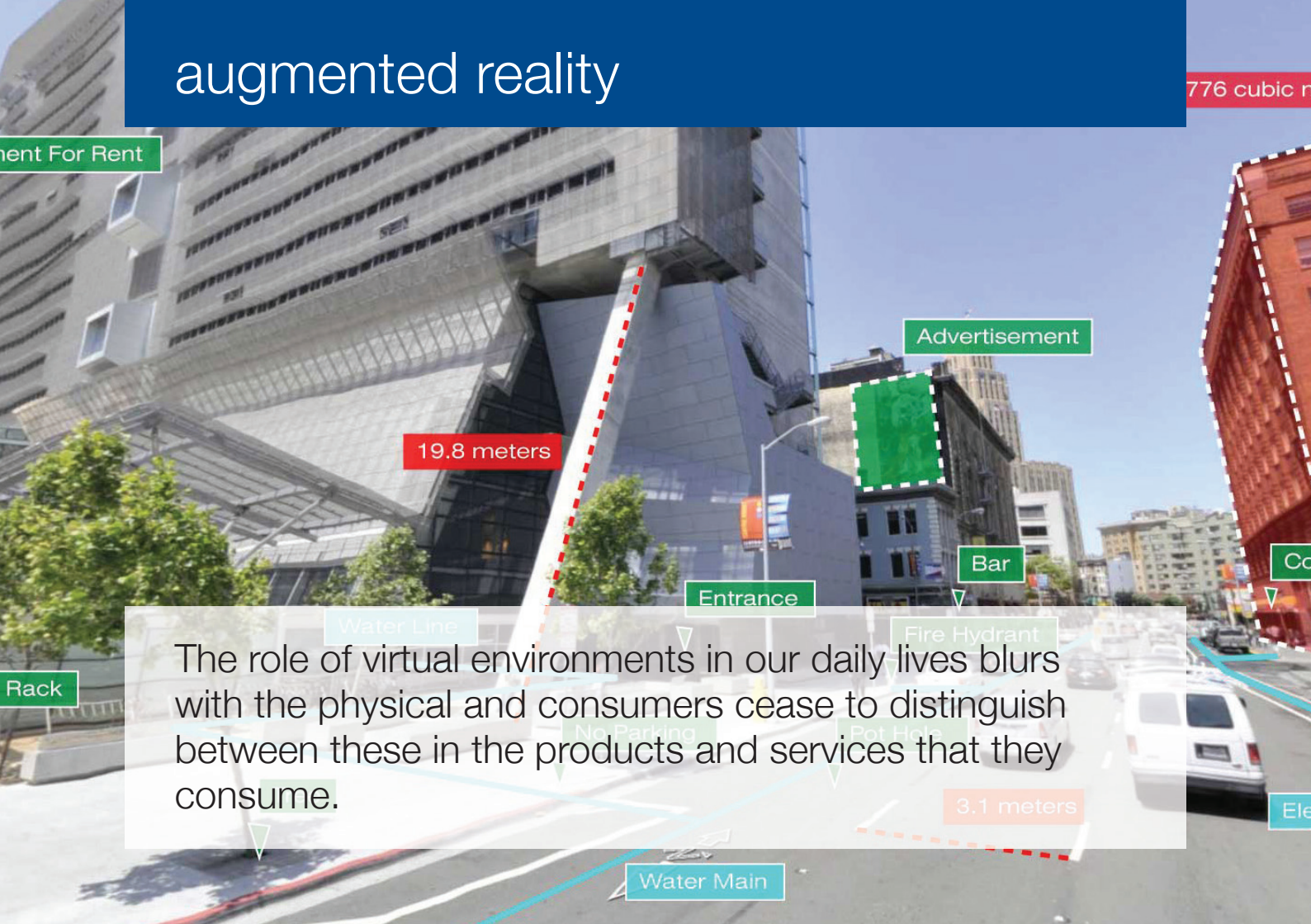
No Parking

Pot Hole

3.1 meters

Water Main

Ele



augmented reality



The role of virtual environments in our daily lives blurs with the physical and consumers cease to distinguish between these in the products and services that they consume.

Signals from Today:

- As younger, digitally-dependent consumers grow up, they expect to have the features and options routinely available in digital modes on offer in real-life too.
- The growth of MMORPG (massively multiplayer online role-playing games) over the last decade with virtual economies where players can spend real money for virtual goods that can be used in-game is changing younger generations attitudes towards virtuality.

Future Impacts:

- Digital Dependents are the next-generation of consumers. Kids are being raised by tech-immersed parents; they have been exposed to digital devices and natural interfaces.
- Virtual dressing rooms, heads-up dashboard displays onto the windscreen of a car, virtual image internet searching and information overlays onto a user's field of vision are all examples of how our real world can be augmented with computer-generated inputs and overlays.

personalised environments



The proliferation of sensors, data and automation are creating reactive environments that can sense anything from weather patterns to user behaviour, and automatically adapt the space and service experience.

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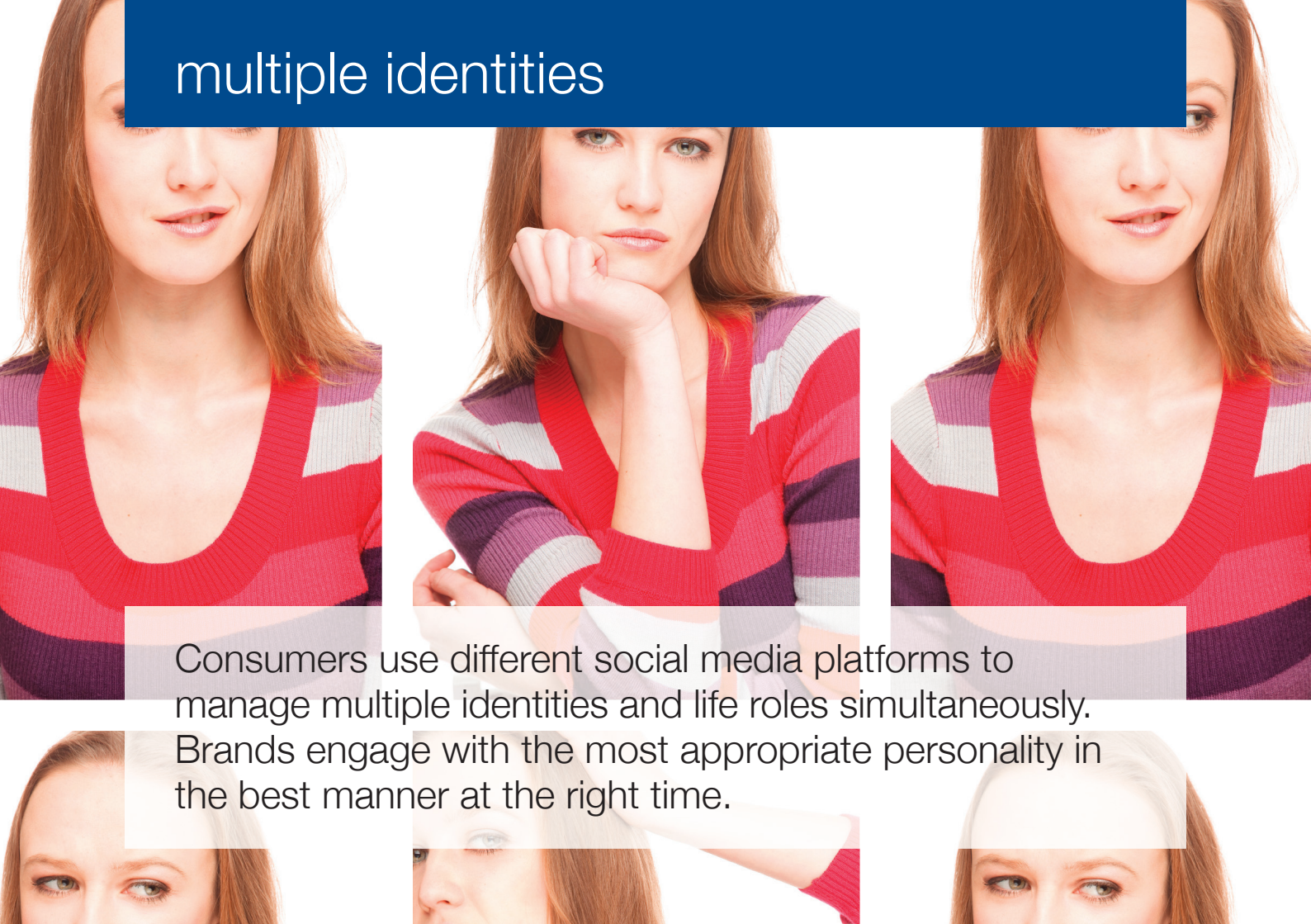
Signals from Today:

- Technological developments in the field of intelligent environments and ubiquitous computing means that everyday objects can be embedded with computing chips, sensors and networked connectivity.
- Designer Ron Arad's series No Bad Pieces is a series of furniture (and walls) covered in a layer of fluid that can be electrically charged in order to change colour in response to any environment.

Future Impacts:

- By 2020, the number of connected mobile devices is set to increase from nine billion today to 24 billion.
- IBM expects over 1 trillion Machine to Machine connections by 2017.
- Smart home technologies – remote monitoring, light and heating control, motion detectors and cameras are all capable of being operated by smart phone.

multiple identities



Consumers use different social media platforms to manage multiple identities and life roles simultaneously. Brands engage with the most appropriate personality in the best manner at the right time.

multiple identities



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Signals from Today:

- People are increasingly managing professional identities online.
- Various social networks allow users to create, maintain and manage separate and distinct parts of their identity with different social circles
- In 2012, social networking hit 1.5 bn users – a vast majority of the world's online population and a 19.2% increase over 2011.
- The percentage of female Internet users who use social networking sites well exceeds that of men (75% vs. 63%).

Future Impacts:

- Almost one in five technology industry executives say that a candidate's social media profile has caused them not to hire that person.
- Usage of multiple identities online varies worldwide as a result of different attitudes towards privacy; in Western markets the trend is towards using a single identity across different social networking platforms tethered to a person's offline identity, e.g., a real name. However, in countries like China, the use of multiple pseudonyms is more common.

curated choice

A group of people is walking through a grand, arched gallery. The gallery features a checkered floor, high ceilings with hanging lanterns, and various classical sculptures and busts on pedestals. The people are seen from behind, moving away from the camera into the distance. The scene is well-lit, highlighting the architectural details and the art collection.

Curators of experiences help travellers digest and absorb the material of greatest importance to them. They research and combine the views of peers, experts and history to create the apparently bespoke.

curated choice



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Signals from Today:

- The Paradox of Choice asserts that giving consumers more product choice actually lowers their purchase satisfaction - having too many options makes us fear missing out, which causes anxiety, analysis paralysis and regret.
- The average American supermarket now carries 48,750 items, which is more than five times the number of items in 1975.
- When customers are offered six options, they are much more likely to buy than other customers who are offered a choice of 24.

Future Impacts:

- Reducing complexity and narrowing choice can boost revenues by 5% to 40% and cut costs by 10% to 35%.
- Research by Iyengar and Lepper suggests that: “The potential for regret about the options not taken—the faster car, the hotel with the better view—seems to be greater in the face of multiple choices.”
- The wide-spread use of cookies on websites means that what gets presented to us will already be customized to fit with our preferences and our profile.

dynamic pricing



Variable pricing to enable real time promotions, personal ability to pay and enhance yield optimisation across the retail sector becomes a growing expectation for others in the services industry.

dynamic pricing



Variable pricing to enable real time promotions, personal ability to pay and enhance yield optimisation across the retail sector becomes a growing expectation for others in the services industry.

Signals from Today:

- Airlines often change prices for returning / lingering visitors to websites.
- Some online retailers charge Mac users higher prices than PC users.
- Dynamic pricing has successfully demonstrated to increase annual revenue on average by 4 to 6%.
- Tingo.com automatically rebooks travellers' reservations when there is a price drop for rooms up to 24hrs before check-in.

Future Impacts:

- Pay-as-you-drive insurance systems have already been trialled to encourage and reward customers for travelling during off-peak hours and on quieter routes.
- Smart meters are introducing dynamic pricing to energy and water consumption.
- Dynamic pricing will become much more prevalent in both professional and collegiate events over the next few years.

educational stays



Hospitality combines stay with unique opportunities for teaching and learning, as demand is driven by consumers interested in using their spare time to be part of a new experience and to gain skills.

educational stays



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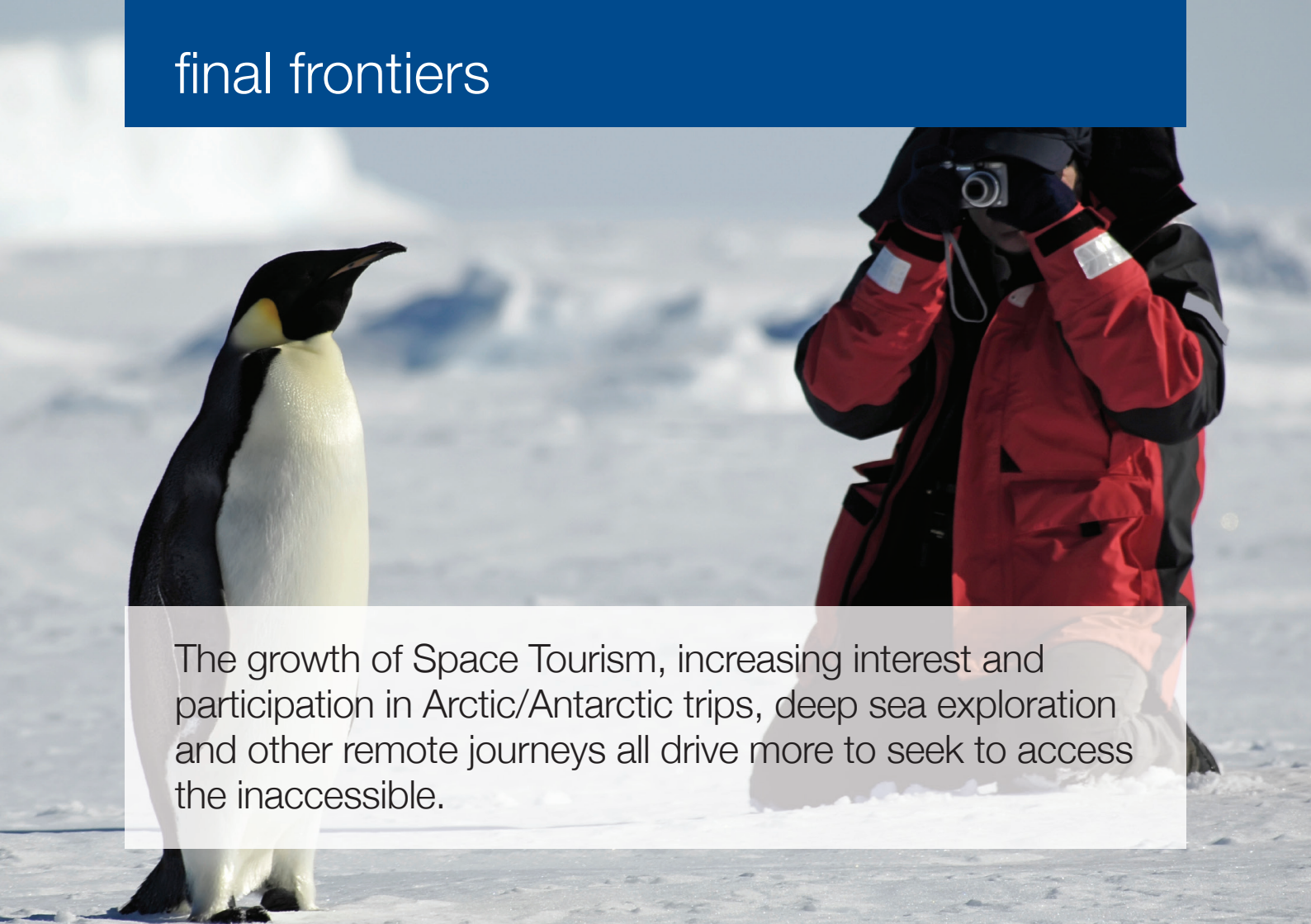
Signals from Today:

- Educational trips are on the rise and offer a concrete value proposition.
- Solo travellers are seeking vacation experiences around shared interests with other travellers and/or locals.
- Information sharing, greatly enabled by the internet, has facilitated the demand by consumers for more unusual and authentic holiday experiences.

Future Impacts:

- 60% of American leisure travellers are interested in taking a trip to engage in culinary activities.
- The increased integration of mobile technology will mean it will become much easier to enhance the educational aspect of any travel experience.

final frontiers

A photograph of an Emperor penguin standing on a snowy ice field, looking towards a person in a red jacket who is taking a picture with a camera. The penguin is on the left, and the person is on the right. The background is a vast, bright, snowy landscape.

The growth of Space Tourism, increasing interest and participation in Arctic/Antarctic trips, deep sea exploration and other remote journeys all drive more to seek to access the inaccessible.

final frontiers



The growth of Space Tourism, increasing interest and participation in Arctic/Antarctic trips, deep sea exploration and other remote journeys all drive more to seek to access the inaccessible.

Signals from Today:

- Virgin Galactic is offering sub-orbital space flights for \$200,000 in late 2013. Over 500 people have signed up for this Virgin Galactic sub-orbital experience.
- Deep Ocean Expeditions can take customers to depths of over 10,000 feet; the trips cost between \$30,000 and \$350,000.
- Antarctica tops the list of most popular remote terrestrial destinations; numbers have grown from 2,000 visitors a year in the 1980s to 27,000 in 2011-12.

Future Impacts:

- The inaccessible is becoming increasingly accessible to a wider audience as technology improves and drives down costs.
- Space tourism, specifically suborbital space flights, could become a billion-dollar market within 20 years.
- Advances in submersible vehicle technology increase access to deeper ocean depths: Virgin Oceanic is developing lighter vehicles with potential for both scientific exploration and tourist rides to deep sea trenches.

responsible tourism



Growth in travel focused on learning about, experiencing or positively affecting ecological conservation, economic development and local community improvements, cultural respect or human rights.

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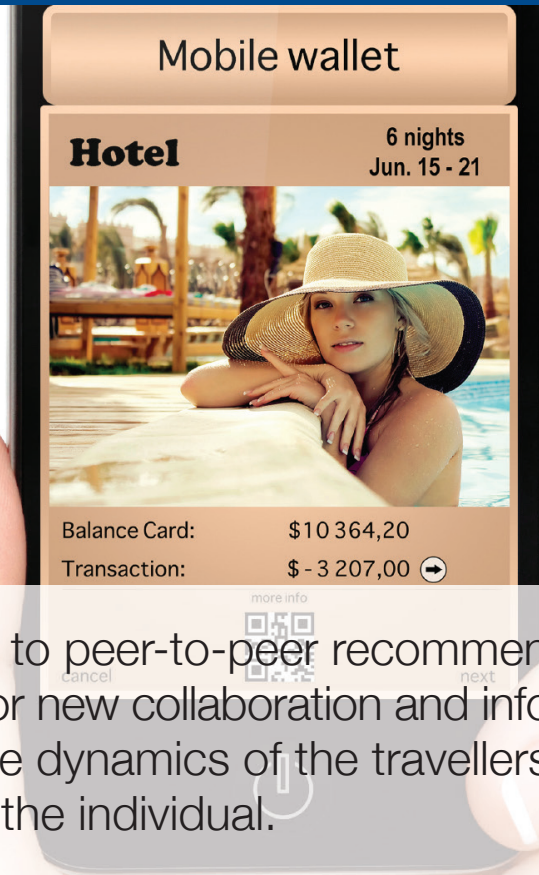
Signals from Today:

- Traveller concerns cover a wide spectrum of issues going beyond environmental interests to impacts on local communities.
- 50% of Americans that travelled abroad in 2010 engaged in nature, culture or heritage tourism.
- 71% of TripAdvisor members surveyed plan to make more eco-friendly choices in the next 12 months.
- Pure NZ seen as a leading tourism campaign over last decade.

Future Impacts:

- Net positive impact sustainable resorts are in development.
- A third of senior travel industry executives think “environmentally aware” holidays will be the biggest consumer trend through 2015.
- Several markets are making sustainable tourism a key part of their future tourism strategy.
- Responsible travel is increasingly being associated with luxury travel: The affluent are moving from ‘conspicuous consumption’ to ‘conscientious consumption’.

self-configured travel



Instant access to peer-to-peer recommendations create opportunities for new collaboration and information-sharing that change the dynamics of the travellers / provider relationship to the individual.

self-configured travel



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Signals from Today:

- 92% of consumers say they trust earned media, such as recommendations from friends and family, above all other forms of advertising.
- Sales of packages to traditional Mediterranean resorts and cities on the Continent fell 14% in the four years to 2007, while independent travel to the same destinations rose 17%.
- Peer-to-peer discussion is rapidly spreading across all demographics.

Future Impacts:

- People seek more in-depth travel experiences, exploring the history, social and cultural impact of a place and its provenance - increasingly facilitated by multiple but different information sources.
- Our ability to access, provide and swap spaces with peers and access each others' experiences is made easier via P2P connectivity and personal editing of preferred stays.
- Emerging market travellers go straight to becoming savvier at going independent and 'doing their own thing'.

faith compliance



Many organizations flex their processes and proactively switch to become compliant with cultural norms. Muslim influence leads with Halal-only meat products and tailored spa experiences.

faith compliance



Many organizations flex their processes and proactively switch to become compliant with cultural norms. Muslim influence leads with Halal-only meat products and tailored spa experiences.


Signals from Today:

- The global Muslim tourism market was worth \$126bn in outbound expenditure in 2011.
- The Muslim population is around 25% of the world's total, and the Halal market accounts for around 16% of the global food industry.
- In Thailand, spa-outlets have introduced the concept of Muslim-friendly spas in a bid to lure tourists from the Middle East.

Future Impacts:

- The total Muslim population is expected to be nearly 50% of world population by 2050 if current growth rates continue.
- Overall spending for international Muslim tourism is expected to reach \$192bn per year by 2020.
- The growth of affluent travellers from China and India means many international hotels incorporate Chinese delicacies and vegetarian offerings.

eastern centricity

The background of the slide features a close-up of three lit incense sticks standing upright in a dark, ornate burner. The sticks are glowing with a warm, orange light. The background is a soft-focus bokeh of numerous warm, yellow and orange lights, suggesting an indoor setting with many small lamps or candles. The overall mood is serene and traditional.

With China's 500m strong middle class burgeoning and travel barriers diminishing, Western and Eastern cultures meet and feed off one another, shifting global norms away from Western standards.

eastern centricity



With China's 500m strong middle class burgeoning and travel barriers diminishing, Western and Eastern cultures meet and feed off one another, shifting global norms away from Western standards.


Signals from Today:

- China's cultural influence is extending in tandem with its growing economic and political influence.
- Exports of traditional Chinese medicine rose in 2011 with a 66% growth in exports to the US.
- In 2011, in the US, fast food Asian restaurants grew well above the international average.

Future Impacts:

- Eastern art, design, and culture are attracting greater attention and examination, both domestically and around-the-world.
- The norm of reciprocity – returning a benefit for another benefit - or guanxi, will accompany a rise of China as the economic engine of the world. Guanxi places huge value on relationship-building, harmony and collectivism, but is largely misunderstood or misinterpreted by westerners.

mega-city living

A modern, open-plan living and kitchen area. The kitchen features light-colored wood-grain upper cabinets and a stainless steel oven. The living area has a light-colored sofa with green and patterned pillows, a dark wood coffee table, and a side table with a vase of flowers. Large windows with white curtains are on the right. The floor is light wood.

With more urbanisation globally and over 50 cities of higher than 10m population, megacities bring new challenges and opportunities in the ways that we adapt to more efficient high density living.

mega-city living



With more urbanisation globally and over 50 cities of higher than 10m population, megacities bring new challenges and opportunities in the ways that we adapt to more efficient high density living.

Signals from Today:

- Urbanisation has been one of the most significant trends in population dynamics over the past century.
- Megacities may be engines of economic growth, but they often feature huge inequalities in the distribution of wealth and economic opportunity.
- Since 2008 more than half the world's population has been living in towns and cities.
- In 2007, 50% of global GDP came from 380 cities in developed regions.

Future Impacts:

- The number of megacities is projected to increase to 37 in 2025, at which time they are expected to account for 13.6 per cent of the world urban population.
- Dense cities such as Paris are the blueprints for tomorrow's architects.
- The explosive growth in urban populations will create tremendous pressures on food, water, waste treatment, and health care.
- By 2025, 136 new cities are expected to enter the top 600, all of them from the developing world.

loss of anonymity

A black and white photograph of a person's eyes looking through horizontal window blinds. The person's face is partially obscured by the blinds, and their eyes are looking directly at the camera. The background is dark and out of focus.

Pervasive people tracking, ubiquitous sharing and open collaborations as the norm erode personal privacy, but greater awareness around managing personal data mitigates the momentum.

loss of anonymity



Pervasive people tracking, ubiquitous data sharing and open collaborations as the norm erode personal privacy, but greater awareness around managing personal data mitigates the momentum.

Signals from Today:

- Anonymity doesn't necessarily exist in the real world.
- In 2012 66% of global consumers said they had concerns about data protection and privacy on the internet.
- UK start-up Allow offers to sell consumers' personal data on their behalf and share the profits with them, for the first time assigning concrete value to privacy and turning personal information into a manageable property.

Future Impacts:

- The young are most likely to take steps to limit the amount of personal information available about them online.
- Some see an inevitable 'privacy Chernobyl' will shift mass behaviour around data sharing. Many disagree.
- 68% of internet users would select a "do-not-track" feature on their browser if it was easily available.

meaningful employment

A young woman with long brown hair, wearing white-rimmed glasses and a grey blazer over a dark blue top, is smiling warmly at the camera. In the background, two other people are blurred, suggesting a professional or educational environment.

Younger generations increasingly want to work for employers that serve a greater purpose, contribute to society and provide space and time for staff to take the initiative in trying to do their best.

meaningful employment



Younger generations increasingly want to work for employers that serve a greater purpose, contribute to society and provide space and time for staff to take the initiative in trying to do their best.


Signals from Today:

- In some regions younger workers expect to achieve a lot from work, not simply financial rewards.
- A job that provides opportunities to make a difference in people's lives was one of the top three reasons to consider a job for 15% of US Millennials and 19% of students, compared with 12% of older generations.
- According to a Cisco survey of students and young professionals under the age of 30, approximately one in three would prioritize social media freedom, device flexibility and work mobility over salary in accepting a job offer.

Future Impacts:

- By 2014, 36% of the US workforce will be comprised of Millennials. By 2020 46% of all US workers will be Millennials.
- Millennials are believed to be self-assured and civic-minded as a generation. They have an appreciable social awareness and a view of community as being beyond their own locality. Millennials want to make the world a better place and feel that they have the power (and tools) to act on this.
- Net Impact's Talent Report 2012 shows that workers want their job to make a difference, ranking only below financial security and marriage when considering elements of their own happiness.

gambling vacations



By 2030, 20 cities have joined the likes of Las Vegas, Macau and Monaco as go-to destinations for high intensity gambling experiences attracting the wealthy and the mobile people with aspirations.

gambling vacations



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Signals from Today:

- Macau is home to the world's largest casino resort – the Venetian Macau – which contains 3,000 suites.
- In South Korea, legal gambling totalled \$18bn last year, whilst illegal gambling has been estimated at twice that.
- Online gambling has grown globally from \$7.4bn in 2003 to \$30bn in 2012.
- 18 US states have commercial casinos and 30 offer legalised gambling.
- France has the largest European casino market worth \$3.8 billion in 2010 twice that of Germany.

Future Impacts:

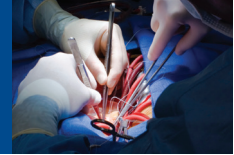
- Global casino gaming revenue is forecast to grow just over 9% per year, rising to \$180bn in 2015.
- Asia will be the fastest-growing region: the value of the market will increase more than treble within five years to \$63bn in 2014.
- Mobile gaming is expected to be an important growth area as the experience of playing on apps improves.
- The gaming and gambling market is becoming increasingly globalised with operators building resorts outside their domestic market.

medical tourism



In key locations where hotel footprints align with the pivotal medical facilities, there is growing demand for accommodation for patients' families and healthcare professionals.

medical tourism



In key locations where hotel footprints align with the pivotal medical facilities, there is growing demand for accommodation for patients' families and healthcare professionals.


Signals from Today:

- Medical tourism is already a growing \$50bn sector and much of it is regional not global.
- Medical tourism could generate more than \$3bn a year for India.
- Thailand, India, Singapore, Malaysia, Hungary, and Poland have developed national strategies for medical tourism.
- Naranaya opening new facilities close to US market in Cayman Islands.
- In 2010, Thailand attracted 1m medical tourists.

Future Impacts:

- Many countries see strong future growth from providing high quality, timely medical support to citizens from other nations.
- Overall medical tourism market is expected to be worth \$500bn by 2020.
- Turkish operators envisage “more tourists for medical treatment than for sun and sand”.
- Dubai Health City aiming to be GMT+4 centres for cardiac surgery.

older employees

An older man with glasses, wearing a white shirt and a blue tie, is seated at a desk in an office. He is looking towards the left of the frame. The desk in front of him has a laptop, a keyboard, a mouse, and some papers. The background shows office cubicles with blue frames and glass partitions. Two circular logos on his tie read "PIMLICO PLUMBERS".

With longer life expectancy and better healthcare globally, more active elderly employees will want to and need to work for longer and increasingly on a part time basis.

older employees



With longer life expectancy and better healthcare globally, more active elderly employees will want to and need to work for longer and increasingly on a part time basis.

Signals from Today:

- Increases in the standard retirement age of women to match that of men are being phased in Australia and Germany, and for both men and women in Hungary, Italy, Japan, Korea and the United States.
- Over a third of UK employees think they will work past the age of 65.
- US CEOs are lobbying to increase the retirement age to 70.
- In Japan almost one in three people are aged 65 or over.

Future Impacts:

- By 2050, ageing populations will be much more in evidence: the population over 60 years old will be larger than the population under 15.
- By 2016, the number of workers aged from 55-64 is expected to increase by over a third, whilst the group of those even older is forecast to grow by 80%.
- Across the EU, the proportion of those aged 65 years or over will almost double from 17.5% to account for close to 30% by 2060.

waste reuse

A green mesh bag is shown hanging from the top, with its opening facing downwards. The bag is made of a fine, woven green material. The background is a clear blue sky with a few wispy white clouds. The lighting is bright, suggesting a sunny day.

Seeing waste as a resource and encouraging its reuse within the operational footprint is an important first step for many keen to meet mitigate risk against key resource constraints.

waste reuse



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Signals from Today:

- San Francisco has achieved a recycling rate of 78% landfill diversion – the highest rate in America and one of the highest in the world.
- Mumbai has an even higher recycling rate than San Francisco - exact figures are unknown but it is estimated at around 90%.
- The waste generated by the richest 3bn people has doubled in the past decade to an average of 1.2kg per capita per day.

Future Impacts:

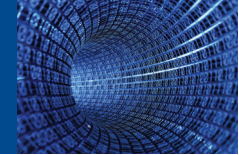
- By 2025 4.3bn urban residents are expected to generate about 1.42kg /per capita per day of municipal solid waste.
- Although zero waste is an ideal, few believe it is an achievable target in the next 20 years.
- The focus of Cradle to Cradle thinking, and C2C Certified Products is fundamentally about constantly improving and moving from simply being “less bad” to becoming “more good.”

big data management



The increasing volume of information from billions of sensors coupled with our growing analytical capabilities enables better ways to access, visualize, manage and leverage appropriate data for improved living.

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Signals from Today:

- Big Data includes content management, data warehouses, data marts and specialized file systems tied together with sophisticated data services.
- It goes hand in hand with cloud computing
- 2012 global spending on database management was over \$27bn.
- More than 30m networked sensor nodes are present in the transportation, automotive, industrial, utilities, and retail sectors.

Future Impacts:

- The number of sensors is increasing at a rate of more than 30% a year.
- The rise of Big Data is opening a growing market in predictive analytics, used in companies to reduce risks, make better decisions and deliver more personal customer experiences.
- If US healthcare were to use Big Data creatively and effectively to drive efficiency and quality, the sector could create more than \$300 billion in value every year.

smart buildings



Increasingly intelligent, better connected, self-monitoring buildings outperform current standards by a significant margin as more data is shared between key operations and providers.

smart buildings



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Signals from Today:

- Better energy management and water provision and consumption, heating and ventilation, lighting, building access is a priority for many.
- More than 100 smart cities are being developed worldwide.
- Smart buildings can reduce energy consumption and CO2 emissions by 50% to 70% and save 30% to 50% in water usage.

Future Impacts:

- The global market for smart building systems is forecast to grow at a rate of 26.6% per year over the next several years.
- Worldwide energy consumption for buildings over the next 20 years will grow by around 45%.
- Unlocking energy efficiency in new building construction, as well as improving appliance and industrial plants' efficiency, could deliver \$42bn in annual savings to India by 2020.

attracting talent



As populations shift rapidly to new markets and services become more specialized, the ability for an organization to attract and retain the right talent in a given area is made more and more difficult.

attracting talent



As populations shift rapidly to new markets and services become more specialized, the ability for an organization to attract and retain the right talent in a given area is made more and more difficult.

Signals from Today:

- The human resources of an enterprise are now the key differentiator among firms, and as such the most critical source of competitive advantage.
- Almost 70% of the identifiable reasons why customers left typical companies had nothing to do with the product. The prevailing reason for switching was poor quality of service.

Future Impacts:

- Some economic growth areas, such as much of Africa, will experience rapid demand from a wealthier society, but will not have the specialised workforces required to deliver increasingly sophisticated services.
- Organisations may have skilled staff within them, but they may be unwilling to locate to areas of growing economic activity where they are most needed.

water management

A top-down view of a stainless steel sink drain. Water is flowing from a faucet into the drain, creating ripples and splashes. The drain has a central stopper and a grate with several slots. The background is a blurred view of the sink's surface.

Managing water supply and demand will be a pivotal issue and one where leading brands take a step forward in seeking to both minimise use and also put back cleaner water than sourced.

water management



Managing water supply and demand will be a pivotal issue and one where leading brands take a step forward in seeking to both minimise use and also put back cleaner water than sourced.


Signals from Today:

- Agriculture is the largest consumer of freshwater globally accounting for 70% of all freshwater withdrawals. Industry takes 20% and consumers 10%.
- Around 2.5 billion people today lack access to safe sanitation.
- As GDP per capita rises, so does water demand.
- Half of China's 660 cities suffer from water shortages, affecting 160 million people.
- The price of water does not reflect its true economic value in most countries.

Future Impacts:

- By 2025, 1.8bn people will be living in regions with absolute water scarcity and two-thirds of the world population could be living in 'water-stress' conditions.
- Economic water stress is expected to impact up to half of the global population by 2020.
- By 2020 new crops will be introduced that are more efficient in their water use.
- By 2030 the world's population could rise by up to a third, demand for food and energy will rise by half and demand for fresh water will increase by 30%.

female centricity

A photograph of two women in professional attire sitting at a small round table in a modern office environment. The woman on the left is wearing a light blue suit and is gesturing with her hands while speaking. The woman on the right is wearing a dark blue suit and is listening attentively. The background features large windows and a bright, airy atmosphere.

New experiences are designed, and established ones are reinvented, with the needs of an increasingly influential female population at the fore rather than as an afterthought.

female centricity



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Signals from Today:

- The empowerment of women is increasingly on the agenda of heads of state and government.
- Women's spheres of influence are now extending beyond their traditional remit of the family and the home to government, business, and the environment.
- Women control \$20-trillion in global annual consumer spending and account for up to 80% of purchasing decisions.

Future Impacts:

- The introduction of regulation may force the issue of female leadership: The EU has targeted at least 40% women non-executive directors on the boards of big listed companies by 2020.
- By 2030, one in four UK women will be the main earner in their household.
- Volvo's 'Your Concept Car' is a vehicle designed by women for women to meet the particular needs of women drivers – Hotels may follow a similar model.

creating shared value

A vibrant outdoor market scene with people and various fresh produce like potatoes, green beans, and lemons. The market is bustling with activity, with several people engaged in transactions. In the foreground, a man in a red shirt is seen from the back, looking at a basket of lemons. To his right, a man in a blue and white checkered shirt looks towards the camera. In the background, a man in a blue sweater is working with a basket of green beans. The market is filled with various produce, including large piles of potatoes, green beans, and lemons. The scene is set under a yellow canopy, and the overall atmosphere is one of a busy, traditional market.

The best employers and organizations, whatever market they are operating in, will work towards demonstrating sensitivity and support for their local community context.

creating shared value



The best employers and organizations, whatever market they are operating in, will work towards demonstrating sensitivity and support for their local community context.

Signals from Today:

- Nestle trains and assists smallholder farmers to foster rural development while ensuring a reliable supply of high quality raw materials.
- Coca Cola's Colevito initiative in Brazil creates shared value by increasing the employability of low income youth.
- Patagonia have partnered with eBay to construct the Common Threads Initiative, a platform built for customers to resell their unwanted products and to keep them in circulation.

Future Impacts:

- Many influential thinkers, such as Michael Porter, feel that in the future business will need to integrate CSR into the heart of their operations, reconnecting economic success with social progress.
- Transparency, authenticity and local connectivity are the currency for successful organisations to connect with staff, customers and communities.
- Networking tools will continue to enable business, charities, social ventures and communities to work together, combining skills and resources to tackle local causes and needs.

eating well

The background of the slide features three glasses of smoothies. In the foreground, a glass of yellow smoothie is garnished with a slice of mango. Behind it, a glass of red smoothie is garnished with several purple grapes. To the right, a glass of green smoothie is garnished with fresh green leafy vegetables. The top left corner has a dark blue header with the text 'eating well' in white.

Progressive hotels offer healthier food options and proactively stop serving high calorie products: Consumption is increasingly linked to offset physical activity to encourage new behaviours.

eating well



Progressive hotels offer healthier food options and proactively stop serving high calorie products: Consumption is increasingly linked to offset physical activity to encourage new behaviours.

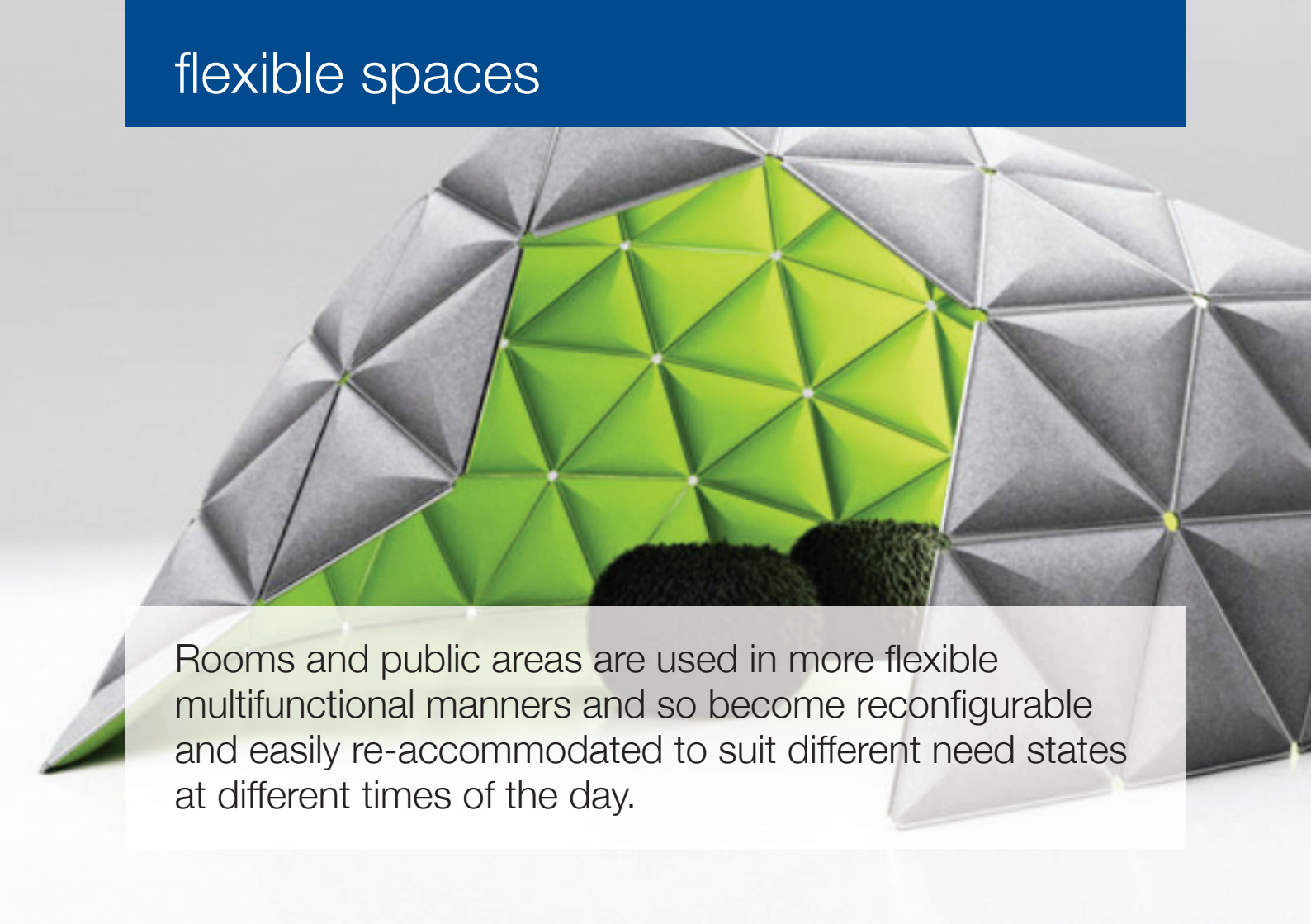
Signals from Today:

- The growing obesity crisis is making healthy food choices increasingly important.
- Consumers often have a good understanding of what the right choices should be but often struggle to put this understanding into practice.
- In 2008, New York introduced legislation requiring the display of calorie content of food on menus in restaurant, cafes, fast food outlets etc.

Future Impacts:

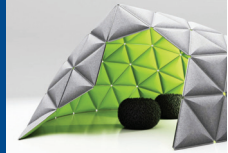
- Lagom is a Swedish concept for 'just enough' that is gaining popularity in design for its minimalist aesthetic and in sustainability as a mode of living suitable for a no-growth economy.
- Unilever has set itself the target of doubling the proportion of its portfolio that meets the highest nutritional standards by 2020.
- Michael Pollen's food rules are gaining traction 'Eat food. Not too much. Mostly plants'.

flexible spaces

A large, geometric dome structure composed of triangular panels. The exterior is primarily grey, with a central section of bright green. The interior is a dark green, textured material. The dome is set against a light grey background.

Rooms and public areas are used in more flexible multifunctional manners and so become reconfigurable and easily re-accommodated to suit different need states at different times of the day.

flexible spaces



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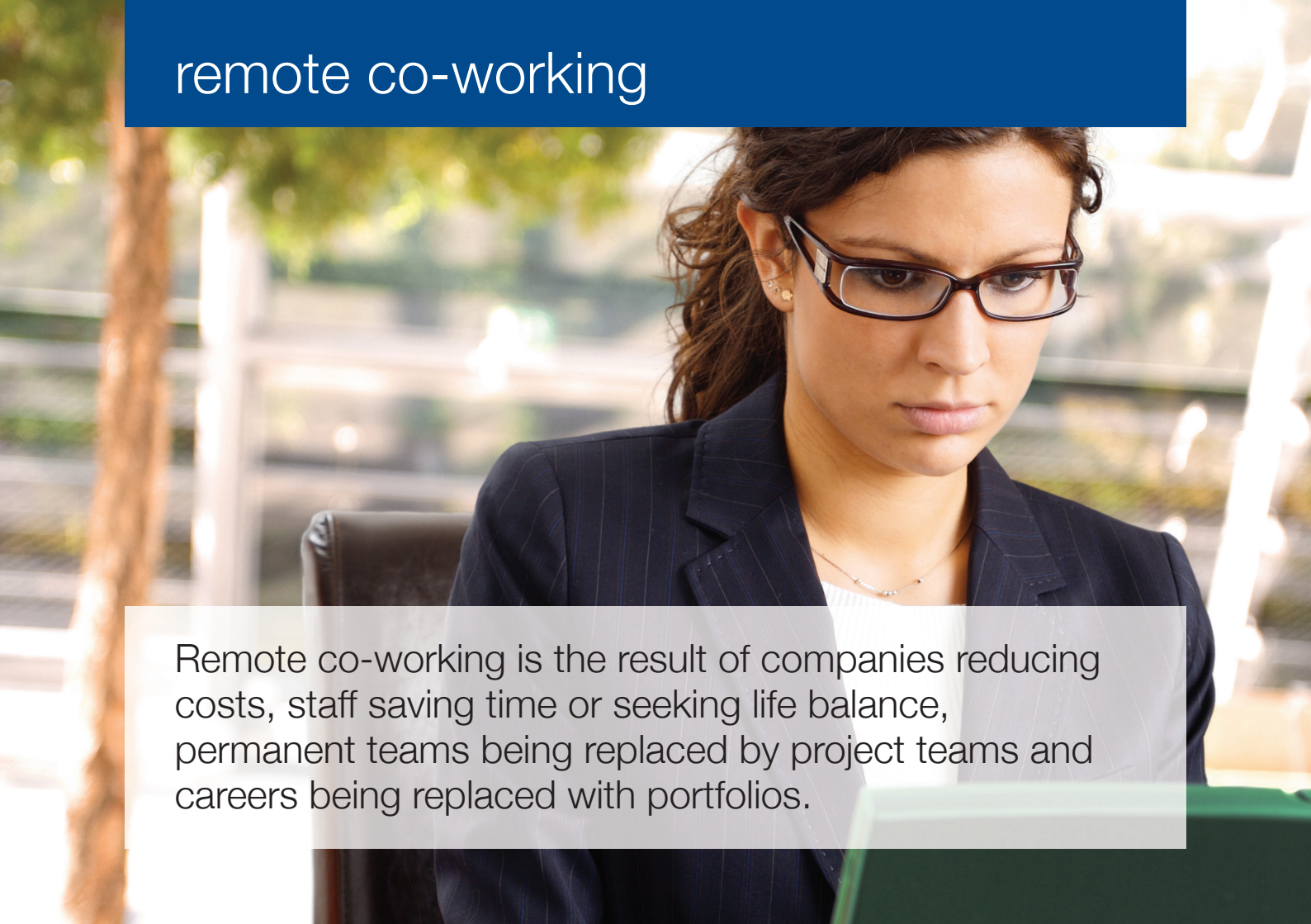
Signals from Today:

- Work spaces are becoming more fluid.
- The lines between office, bar, coffee counter and even store are all blurring.
- Spaces are being designed to serve a mix of uses, users and usage in order to maximise their utility and efficiency of use.

Future Impacts:

- With more people living in smaller living spaces, there is likely to be a growing need to make smaller space feel more aspirational; an upgrade rather than a downgrade.
- The increasing growth in online trading is having an impact on physical trading locations, e.g., the high street, and is causing a re-think among planners and entrepreneurs about recycling the use of these spaces.

remote co-working

A woman with dark hair, wearing glasses and a dark pinstriped blazer, is looking down at a laptop screen. She is sitting in a chair in a bright, outdoor setting with trees and a white fence in the background. The scene is well-lit, suggesting a sunny day.

Remote co-working is the result of companies reducing costs, staff saving time or seeking life balance, permanent teams being replaced by project teams and careers being replaced with portfolios.

remote co-working



Remote co-working is the result of companies reducing costs, staff saving time or seeking life balance, permanent teams being replaced by project teams and careers being replaced with portfolios.


Signals from Today:

- One in five workers worldwide telecommutes frequently, working remotely from their office or communicating by email, phone or online chats.
- Time is a major driver for the growing interest in avoiding the journey into the office.
- The number of US employees who work from home at least one day a month has been rising steadily each year since 2007.

Future Impacts:

- By 2020, 80% of the global population will have access to mobile telephony, and more than 60% of the world will have access to smart phones or tablet computers.
- With 30% of us 'free agents' by 2030 mobile workers choose more appropriate 3rd spaces to access and share high quality services while away from the home or office.

transport hub proximity



A decrease in the dominance of the car and improvements in public transport infrastructure and options results in guests selecting the best-connected locations for multi-modal travel.

transport hub proximity



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Signals from Today:

- Governments are working out how they can make the best of what transport infrastructure they have.
- Finding new ways to make existing transport as efficient as possible focus on seamless travel.
- Cities such as Munich and Vienna are seen as global role models for efficient multi-modal urban transport.

Future Impacts:

- Multi-modal transport access will be a pre-requisite for many buildings.
- Governments and their operating agencies are increasingly more focused on, and better able to conduct, 'joined up' strategies which are fed by a combined focus on key areas such as transport, spatial planning and economic development.

alternatives for travel



Providing alternative but accessible locations for connecting, sharing and temporary working to avoid the need to travel is a growth opportunity for many connected hubs.

alternatives for travel



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Signals from Today:

- 43% of travellers who had travelled to the US warn their fellow countrymen and women not to visit because of the cumbersome entry process.
- Live video streaming and more sophisticated tele-presence systems are gaining in popularity.
- Continuing poor economic outlook and programmes of austerity are causing individuals and families to look closer to home for their leisure endeavours, including enjoying ordinary activities like baking, gardening, knitting and involvement in community activities.

Future Impacts:

- New providers of local video-conferencing facilities within accessible work hubs are planned for many regions.
- Online activity and peer to peer connectivity including intricate Alternate Reality Games and virtual cities and worlds, will continue to provide to many a form of escapism and ‘travel’ without them having to leave home.
- The free agent workstyle is showing growth and popularity among all generations, but is particularly attractive to the millennial generation.

hospitality in transit

The image shows the interior of a transit vehicle, likely a train or ferry. The foreground features a cream-colored leather seat with a dark wood trim. To the right, there is an oval window with a blue tint. The ceiling is white with a square light fixture. In the background, a dark wood door is visible, with an illuminated "EXIT" sign above it and safety icons on the wall. The overall atmosphere is clean and modern.

Travellers increasingly take advantage of more flexible and comfortable overnight ferries, trains and planes to make best use of journeys for efficient and effective sleep and restoration.

hospitality in transit



Travellers increasingly take advantage of more flexible and comfortable overnight ferries, trains and planes to make best use of journeys for efficient and effective sleep and restoration.

Signals from Today:

- Finding ways of making the journey as productive and positive experience is becoming increasingly critical.
- Cruises represent increasingly desirable hospitality on-the-go experiences, with higher quality guest service than hotels with comparable star ratings.
- Long-distance rail services that offer comfortable and affordable sleeping facilities such as Deutsche Bahn's City Night Line service and Spanish Trenhotel.

Future Impacts:

- Overnight stays are increasingly replaced by en route sleep.
- With the advent of online and mobile applications, hotels will face increasing competition – and opportunities - for attracting customer's attention, wherever and whenever they happen to be.
- Customers-on-the-go will expect opportunities to enjoy food choices that are as varied, fresh and as nourishing as those that are available in fixed locations.

thoughtful consumption

A photograph of a salmon leaping from the water, captured in mid-air. The fish is angled upwards and to the left, with its body glistening with water droplets. The background is a blurred, dynamic scene of water splashing and white foam, suggesting a fast-moving stream or waterfall. The lighting is bright, highlighting the texture of the fish's scales and the spray of water.

Recognizing the pivotal materials up front and better managing the associated cradle-to-cradle lifecycles becomes an economic necessity as well as an expected performance criteria for all companies.

thoughtful consumption



Recognizing the pivotal materials up front and better managing the associated cradle-to-cradle lifecycles becomes an economic necessity as well as an expected performance criteria for all companies.

Signals from Today:

- Guaranteeing food and energy security leads to a greater focus on using more efficient farming methods and climate technology.
- Land, food, water and energy provision is now viewed by many as requiring as high a prioritization as access to, and supply of, key metals and minerals.

Future Impacts:

- Buying habits are influenced by a growing awareness of global issues that are affected by consumption and buyers redirect purchases accordingly to brands that take greatest responsibility.
- Individuals contribute to local and global sustainability and adopt more responsible patterns of buying and consumption, thereby consuming less energy and fewer resources.

intra-country travel

A sleek, white and blue high-speed train is stopped at a modern train station platform. The station has a large, curved, blue-tinted glass and metal roof structure. The train is positioned on the left side of the frame, extending towards the right. The platform is clean and well-lit, with a red stanchion and rope in the foreground. The overall scene conveys a sense of modern infrastructure and efficient transportation.

Significantly increased mobility within China and other emerging markets drive greater internal demand for accommodation and meeting spaces for both businesses and families.

intra-country travel



Significantly increased mobility within China and other emerging markets drive greater internal demand for accommodation and meeting spaces for both businesses and families.

Signals from Today:

- China is extending its high speed rail network to 45,000 km by 2015 connecting every significant city at a cost of RMB 700bn pa.
- Domestic tourism contributions, compared with international visitor contributions, are as high as 60 percent of the total tourism income in the Asia Pacific region.
- Internal travel in Brazil hit nearly 69 million in 2010, an increase of 18 % on 2009; the largest jump since the statistics began in 2000.

Future Impacts:

- China's middle class is now about ten per cent of China's population, and is on pace to be forty per cent by 2020.
- By 2016, the five largest markets for domestic passengers will be the United States, China, Brazil, India and Japan.
- Russia aims to boost the number of domestic tourists by 150% by 2018 via funding from the government regional and municipal budgets and private sources.