

A NEW WORLD DISORDER? Navigating the polycrisis

Key takeouts for the
TRAVEL, TOURISM &
HOSPITALITY SECTORS

GLOBAL TRENDS 2023



IPSOS GLOBAL TRENDS 2023: TRACKING HOW ARE PEOPLE CHANGING

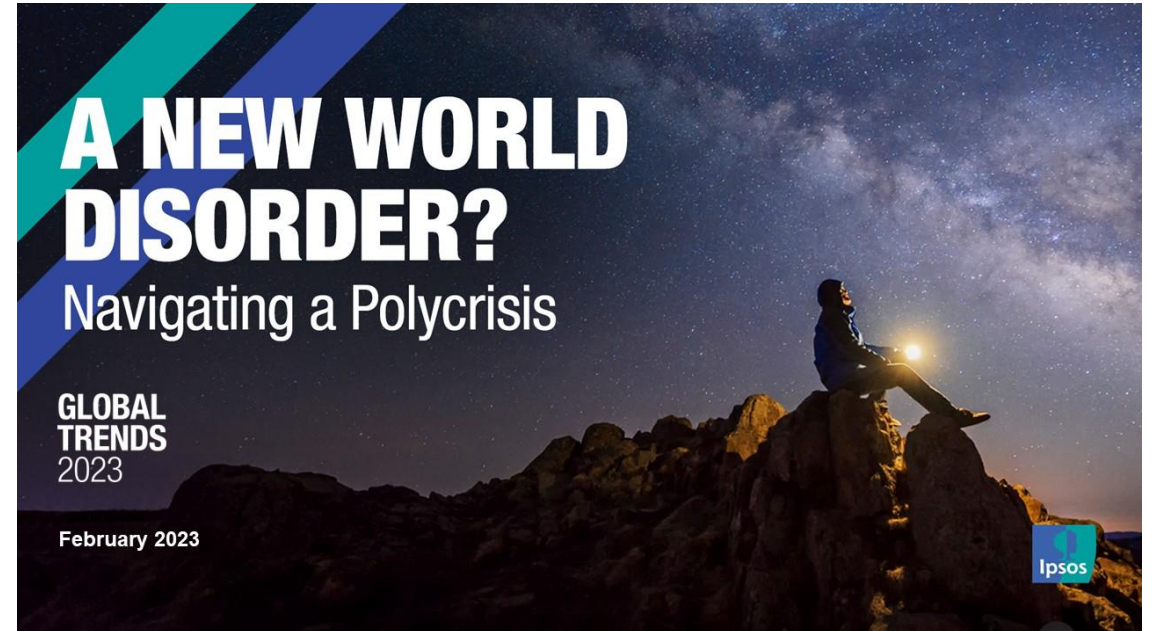
Since 2013 Ipsos has been tracking the values, attitudes and behaviours of people around the world via our Ipsos Global Trends service (IGT). This year's survey, conducted at the end of 2022, is our biggest ever, comprising some 48,000+ interviews across 50 markets, with strong representation across all regions, allowing us an unprecedented window into the lives and concerns of the public.

Understanding change within any sector is about understanding both top-down and bottom-up change:

- **Top-down change** refers to broad cross-category changes. These affect people irrespective of their relationship with specific product categories but will have different impacts from one sector to another
- **Bottom-up change** refers to specific changes within individual categories – both changes in what users need and want, and changes in what those in category bring to the market and how they do so

Ipsos Global Trends is a hugely valuable resource to understand top-down change. Our 2023 report entitled “**A NEW WORLD DISORDER? Navigating the polycrisis**” is available for download:

<https://www.ipsos.com/en/global-trends>



IPSOS GLOBAL TRENDS COVERS SIX MACRO FORCES (INCLUDING 26 DETAILED THEMES) AND TWELVE GLOBAL TRENDS

SIX MACRO FORCES AND KEY THEMES



TWELVE GLOBAL TRENDS



For more insight, data, marketplace signals and thought-starters relating to the Macro Forces and trends described on this page, download our free Global Trends report for 2023: <https://www.ipsos.com/en/global-trends>

WHAT DOES THIS MEAN FOR THE TRAVEL, TOURISM & HOSPITALITY SECTORS?

In this document, our **TRAVEL, TOURISM & HOSPITALITY** category experts have evaluated the macro force and trend dimensions covered in IGT and identified the key factors that will shape the **TRAVEL, TOURISM & HOSPITALITY sector** during 2023 and beyond.

From these, we have identified **nine key drivers of change** and brainstormed some thought-starter implications for each.

Once you have digested these, please:

- Download our free Global Trends report for 2023 for more insight, data, marketplace signals and thought-starters relating to the Macro Forces and trends described in this document, : <https://www.ipsos.com/en/global-trends>
- Contact us to discuss how we can help you navigate the polycrisis.
- Attitudes to travel and tourism are highly driven by cultural factors and traditions. The trends we have outlined in this document are global in nature but, of course, will vary widely from one market to another. We can leverage our 50 country dataset to help you understand what these trends look like in the markets you care about.



THESE BROADER MACRO FORCES AND GLOBAL TRENDS DRIVE CHANGE IN THE TRAVEL, TOURISM & HOSPITALITY SECTORS



Our six global Macro Forces and key themes
 Operating at a broad level, Macro Forces have far-reaching impacts within countries and across borders, affecting societies, markets and people.

Societies in Flux	Tech-celeration	Inequalities and Opportunities	Environmental Emergencies	Political Splintering	Well-rounded Well-being
Ageing populations	Pervasive technology	Rise & fall of middle classes	Climate change	Plateau of globalisation	Growing mental health crisis
Community migration	The immersive frontier	Employee power shift	A greener way of thinking	Security dilemmas	Systemic health inequality
Life stage evolutions	AI advances & quantum computing	Generational wealth disparities	Over-development	Rethinking institutions	Integration of health & technology
Greater ethnic & religious diversity	Increased automation	Impacts of inflation		Increasing geopolitical conflicts	
Identity fluidity	Toll of technology	Alternative value structures		Entrenched inequality	

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DRIVERS OF CHANGE IN TRAVEL, TOURISM & HOSPITALITY



- DIGITAL TRANSFORMATION OF TRAVEL
- IN-ROOM PERSONALISATION
- EXPERIENCE-DRIVEN BOOKINGS
- HEALTH CONSCIOUS TRAVEL
- REDUCING THE TRAVEL FOOTPRINT
- WFH BECOMES WFA
- #INSTATRAVELLING
- REVENGE TOURISM GOES LUXE
- OFF THE BEATEN TRACK

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DIGITAL TRANSFORMATION OF TRAVEL

THE WHAT?

The global digital transformation

Macro Forces:
TECH-CELERATION

Trends: **DATA DILEMMAS**
and **THE TECH**
DIMENSION

Whether it's that eerily accurate advert that pops up after you and your spouse have agreed to buy a new sofa, or your quick acceptance of the default cookie settings on a website so you can read an article a colleague just sent you, at times we all question who has our data and what they're doing with it. But how much do people *really* care? And perhaps more importantly, are they willing to do something about it? The rapid pace of technological change and disruption over the past few decades cannot be understated. However, years on, many people are wondering whether the promises made by Big Tech have been kept, and what we need to do collectively to harness the potential of tech – and mitigate its risks.

73%

I wish my life was more simple

71%

can't imagine life without the internet

THE “SO WHAT”?

What might this mean for the **TRAVEL & HOSPITALITY** sector?

The ascent of AI will further push the envelope of digital transformation. Hotels, airlines, visitor attractions and other parts of the hospitality, travel and tourism space are adopting new technologies to elevate customer experience.

At one basic level, the streamlining of travel through data represents a quick win. As international travel has mainstreamed, travellers have become more and more demanding and less and less tolerant of delays, lack of information, poor service and mistakes.

If empowered by passenger or guest data permissions, providers can up their game by streamlining check-in procedures, bypassing or fast-tracking security procedures, with many of the necessary checks happening in the background.

Attitudes to data sharing may differ markedly from one sector to another: how can you leverage passenger or guest data to offer a better experience?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are leveraging new technologies to provide seamless travel experiences



IATA'S One ID seeks to introduce a collaborative identity management solution that spans all process steps and stakeholders in the end-to-end journey, from booking to arrival at destination and back, putting the passenger at the centre. The concept relies on early validation of the passengers' identity, and controlled access to this information by the various public and private stakeholders on an authorized-to-know basis. This is done so that the passenger can be recognized and attended to in the most efficient way in subsequent process steps.

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IN-ROOM PERSONALISATION

THE WHAT?

Optimising through data-driven personalisation

Macro Forces:
TECH-CELERATION

Trends: **DATA DILEMMAS**
and **THE TECH**
DIMENSION

Whether it's that eerily accurate advert that pops up after you and your spouse have agreed to buy a new sofa, or your quick acceptance of the default cookie settings on a website so you can read an article a colleague just sent you, at times we all question who has our data and what they're doing with it. But how much do people *really* care? And perhaps more importantly, are they willing to do something about it? The rapid pace of technological change and disruption over the past few decades cannot be understated. However, years on, many people are wondering whether the promises made by Big Tech have been kept, and what we need to do collectively to harness the potential of tech – and mitigate its risks.

45%

People worry too much about their privacy online - I'm not concerned about what companies or the government know about me

81%

feel that it is inevitable that we will lose some privacy in the future because of what new technology can do

THE “SO WHAT”?

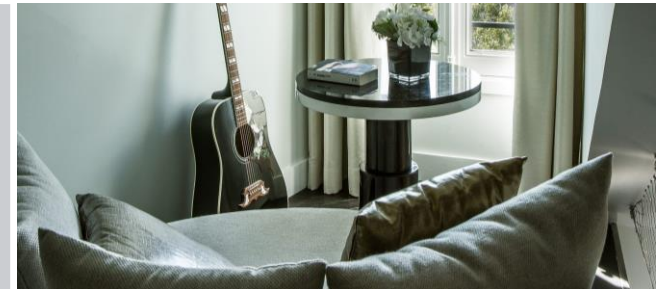
What might this mean for the **TRAVEL & HOSPITALITY** sector?

The same data permissions that can drive streamlined experiences can also be used to offer more personalised travel experiences. Travel industry data remains highly siloed (frequent flyer or guest programmes have no vested interest in sharing data with others) but from a traveller point of view there is a great deal to be gained from a more holistic “Open Travel” approach much like what is going on in Open Banking. Imagine checking in to a hotel room only to find the minibar is already stocked with organic options because the hotel knows from your supermarket data that you favour such products. But even this is only the beginning. These are examples of predictive personalisation based on previous patterns. The next step is contextual personalisation where offerings are based on moment-to-moment variables such as the weather, your location, your mood or even your body's vital signs. Again, this is permission dependent and getting agreement to use these more personal data streams will be a difficult but very rewarding challenge

Ask yourself: what else would you like to know about your passengers or guests? And how would you use that knowledge to improve your offer?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are leveraging new technologies to provide personalised travel experiences



At **Fauchon l'Hotel**, Paris guests are encouraged to tell staff what they would like to eat, rather than order from a menu. Check-in and housekeeping is also conducted according to individual needs and demands. General manager Jerome Montanteme says he now considers their bespoke and individualised approach to be the “norm” for the future and insists that Fauchon l'Hotel will remain uber-personalised even when mainstream travel revives.

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EXPERIENCE-DRIVEN BOOKINGS

THE WHAT?

Experiences over material possessions

Macro Forces:
TECH-CELERATION

Trends: **AUTHENTICITY IS KING**

The transition from materialism to experiences has been one of the key stories of the past few decades, in Western societies at least. While many of those in emerging markets are, understandably, looking to acquire the trappings of a successful life, driven by the rapid economic growth in those markets, a post-material age mentality is growing in more developed markets. There has been a shift towards the prioritisation of experiences over material goods.

Of course, Covid has its part to play here, since it has deprived people more of out-of-home experiences than it has deprived them of material possessions which they have still been able to access via online deliveries.

74%

I would like to experience living in a different part of the world

THE “SO WHAT”?

What might this mean for the **TRAVEL & HOSPITALITY** sector?

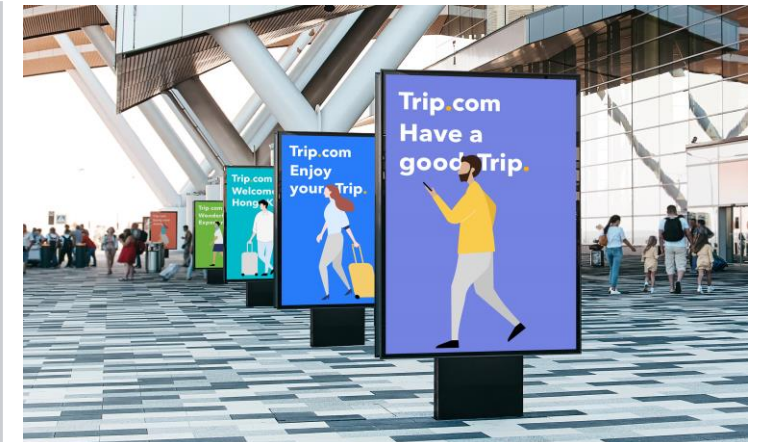
Guests will value the opportunity to book a room or a flight that comes with a specific experience built in. These can be premium, immersive, and authentic: cooking classes, guided tours of the city, language classes or city immersions while on a flight, and so on,

Typically, such experiences have been restricted to the top end of the market, with luxury hotels opening up their wine cellars or art collections to their uber wealthy patrons. But, there is no reason at all why it needs to be a luxe experience only. As travellers look for more and more authenticity even more mainstream and budget operators can look to elevate experiences to build memorability and uniqueness.

Ask yourselves what experiences can you build in to your offering. What resources and expertise do you have amongst your staff? Maybe your concierge is a superfan of the local football team and can offer real fan experiences to your guests rather than merely being a source of tickets. Creativity is the key.

WHO IS ALREADY ACTING ON THIS?

Adding experiences helps lift travel and hospitality to new levels



Consumers seeking advice from the China-based online travel agency, [Trip.com](https://www.trip.com) no longer need to wait for a virtual customer service representative. As of February 2023, their questions will be answered by a ChatGPT-powered bot called Tripgen.

HEALTH CONSCIOUS TRAVEL

THE WHAT?

The drive to healthier living

Macro Forces:
WELL-ROUNDED WELL-BEING

Trends: **CHOICES OVER HEALTHCARE** and **CONSCIENTIOUS HEALTH**

While the pandemic understandably required governmental-level oversight, legislation and enforcement, the longer-term trend has been for people to want more direct access to healthcare and more control over their solutions and outcomes. Consumers continue to want more access to providers and specialists, regardless of their location, and more control over their well-being. Medical professionals have been weathering the pandemic and demand fair compensation and treatment.

Health is becoming more holistic, taking into account multiple meanings of well-being. The interconnectedness of health with other systems is also being examined, to begin to address inequities.

80%

of global consumers agree 'I need to do more to look after my mental well-being'

86%

of global consumers agree 'I need to do more to look after myself physically'

83%

of global citizens agree 'I would like more control over decisions about my health'

THE "SO WHAT"?

What might this mean for the TRAVEL & HOSPITALITY sector?

People place a high value on both mental and physical health - in many cases it is regarded as an essential pre-requisite for a happy life. People increasingly know what they are supposed to do but there is a large and growing see-do gap, made larger by the high cost of living, buying and eating healthily. The role of travel in wellbeing has long been recognised but it is now being elevated to new levels. According to [Market.us](https://www.market.us), the global medical tourism market accounted for USD 11.7 billion in 2022 and is projected to reach USD 35.9 billion by 2032, and more and more hotels (and airlines) are building wellbeing into their offerings. These include digital detoxing, meditation and mental health, air quality, anti-allergenic rooms, and others. As well as positive contributors to wellbeing many efforts are being made to eliminate some of travel's contributors to negative wellbeing.

How can you make your offering contribute positively to heightened wellbeing? How can you remove tensions or pain points in your passenger or guest experiences?

WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are tapping into the demand for healthy travel



[Visit Finland](https://www.visitfinland.com) launched a competition inviting consumers to win one of 10 places at a four-day happiness masterclass. The retreat will be held at Kuru Retreat in the country's Lakeland region, featuring expert-led classes which revolve around food and wellbeing, health, design and natural lifestyles.

REDUCING THE TRAVEL FOOTPRINT

THE WHAT?

Growing recognition of the need to tread lightly

Macro Forces:
**ENVIRONMENTAL
EMERGENCIES**

Trends:
CLIMATE ANTAGONISM

Climate change has become a visceral reality, with the past year seeing the largest number of climate-related disasters in recorded history. But there is rampant debate about who is responsible for climate change and how to address it: some consumers are changing how they make purchasing decisions according to their environmental impact, while others are putting the responsibility squarely on the shoulders of government, systems and corporations.

28 July

Earth Overshoot Day in 2022: the date by which demand for natural resources had exhausted what the Earth can regenerate

80%

feel that we are heading for environmental disaster unless we change our habits quickly

THE “SO WHAT”?

What might this mean for the **TRAVEL & HOSPITALITY** sector?

The travel, tourism and hospitality sector is no different from other sectors in its need to address the sustainability of its operations: running flights and hotels must be as low impact as possible and waste minimisation is a key issue to address. Greener fuels, low emissions in hotels and offsetting are all valid tactics to minimise the impact of the sector.

Sustainability is a complex subject for hospitality, particularly when tied in with the benefits of economic development in developing economies. KLM famously asked people to fly responsibly a couple of years back and pre-Covid, flygskam (or flight shaming) went viral. As societies come out of lockdown and people want to “make up for lost time” there is a danger that the need to act in the interests of the planet is lost, at least temporarily.

What is your ESG strategy? How do you communicate it to your customers? How transparent are you prepared to be?

WHO IS ALREADY ACTING ON THIS?

The travel sector is acutely aware of the need to embrace sustainability



In March 2023, [Delta Hotels by Marriott, Dubai Investment Park](#) announced that it has installed two of Airowater’s Atmospheric Water Generators (AWGs); appliances which transform air humidity into drinkable water. Each appliance generates between 500 and 1,000 litres of water per day, enough to supply the entire hotel.

WFH BECOMES WFA

THE WHAT?

Lockdown changed the rules of work

Macro Forces: **IDENTITY FLUIDITY** and **EMPLOYEE POWER SHIFT**

Trends: **INEQUALITY & UNCERTAINTY** and **CAPITALISM'S TURNING POINT**

Lockdowns around the world changed the rules of work – for those able to substitute working in an office with working from home at least. With Covid now deemed “over” by the WHO, some corporations and governments are seeking to encourage the workforce back into the traditional workplace – corporations cannot pay for real estate standing empty forever and governments regard a return to “normal” as key to drive economic recovery. But, its not that simple. Many have become used to WFH and highly value the flexibility it offers. Many are trying to find hybrid routes forward. It seems likely that the future will be one of more variability in how, when and where people do their work.

49%

I feel that I am more a citizen of the world than a citizen of my country

81%

feel that it is inevitable that we will lose some privacy in the future because of what new technology can do

THE “SO WHAT”?

What might this mean for the **TRAVEL & HOSPITALITY** sector?

Hotels and destinations encouraged Work from Home to become Work from Anywhere with pricing policies, promotional campaigns and at least 21 countries now offering “[digital nomad style visas](#)”.

The trend initiated during the pandemic will likely continue and the industry should continue to offer workspaces and other amenities to encourage the behaviour.

What can you offer to encourage a WFA habit for your venue?

The Caribbean island nation of Antigua & Barbuda has announced a digital nomad visa called the [Nomad Digital Residence \(NDR\)](#). This visa is good for 2-years, and visitors will be required to maintain their own health insurance plan while staying within the country and enjoying its 365 different beaches.



WHO IS ALREADY ACTING ON THIS?

WFA offerings are springing up in the most unlikely places



[Campsited](#), the Ireland-based online marketplace for nature holidays, launched its ‘Open Air Work From Anywhere’ program in March 2023. The scheme has been created for employers looking to provide their employees with the opportunity to work remotely from one of Campsited’s leafy destinations across Europe. Employees of participating companies can choose from various 12-week escapes across Europe, with strong wifi and all necessary amenities guaranteed.

#INSTATRAVELLING

THE WHAT?

Creating our personal brand online

Macro Forces:
TECH-CELERATION

Trends: **TECH DIMENSION**

While there are some signs of a push back against social media usage and against social media giants and their owners, these platforms still take up a huge slice of the daily attention of many millions worldwide. [Techjury](#) claims that 16-24 year olds may spend over 5 hours a day on social media, and while others are more conservative in their estimates, it is clear that peoples' lives will continue to involve a great deal of online social interaction for many years to come.

61%

have used a social network in the past week

81%

agree that social media companies have too much power

THE “SO WHAT”?

What might this mean for the **TRAVEL & HOSPITALITY** sector?

Social media posts have long been a vital tool for the industry but they are increasingly used throughout the various stages of the literal and metaphorical journey: from inspiration, through pre-booking and booking, pre-trip and while travelling, in destination and beyond.

Providers are increasingly recognising this role and are both enabling shareability (by both creating spaces that are visually appealing and shareable on social media and providing good connectivity) and incentivising it. The role of travel influencers too cannot be overstated, though their credibility has been dented by the recognition that this is paid rather than spontaneous content.

Are you doing enough to make your experience “good for the Gram”? Can you better leverage social media sharing to promote your business and attract younger travellers?

WHO IS ALREADY ACTING ON THIS?

Spaces, destinations and travel providers are recognising the need to create visually appealing and shareable content for guests



To mark Black History Month in February 2023, [Pinterest](#) launched 'Find Your Routes', an online travel hub with tips for safe travel, suggestions of places to connect, and a curated selection of Black-owned travel brands. The brand's initiative was inspired by 'The Negro Motorist Green Book' (a Jim Crow-era guide book for Black travellers in the US) with the aim of not only improving the experience of Black travellers but also unlocking little-known pockets of Black history across the globe.

REVENGE TOURISM GOES LUXE

THE WHAT?

More bang for the buck – Part 1

Macro Forces:
**IMPACTS OF
INFLATION**

Trends: **INEQUALITY &
UNCERTAINTY** and
DIVIDED WORLD

Uncertainty has become the only certainty. People in many markets are facing economic instability as currencies shift in value, inflation rises, supply chains continue to be disrupted, and governments change. Financial inequality, already a driver of change, worsened in the pandemic. In every corner of the globe, struggles to achieve parity based on gender, race, ethnicity and religion dominated headlines. Where can people turn to find confidence, and how can they minimise their risks in an uncertain climate? The effects of the cost of living crisis are not being felt equally by all parts of society, with considerable evidence that inequality within countries is continuing to rise, creating an even bigger layer of society that is vulnerable and disenfranchised.

61%

The important thing is to enjoy life today, tomorrow will take care of itself

70%

of global consumers feel that the rate of inflation (the rate at which prices are rising) will go up a lot or a little in the coming year.

THE “SO WHAT”?

What might this mean for the TRAVEL & HOSPITALITY sector?

The natural tendency for “revenge spending” (Revenge buying refers to a sudden surge in the purchase of consumer goods after people are denied the opportunity to shop for extended periods of time) is in conflict with the cost of living crisis. As soon as people were able to travel once again they were suddenly confronted with a difficult and potentially long-term financial future. Instead of making them put off travel it seems to be creating a “live for the moment” mentality and, within travel, one way this is being expressed is in “pushing the boat out” – people really trying to enjoy their travel experiences to the full.

How can you elevate your passengers experiences? For those not willing to go full luxe, how can you bolt on some premium elements to make their trips really special?

WHO IS ALREADY ACTING ON THIS?

This is a good moment for trading up



Lufthansa are reporting the “very strongest demand” for travel this year had been in its premium cabins (and they are not alone in saying this). CEO Carsten Spohr said he expected a “permanent shift” towards holidaymakers filling business and first-class seats, as he drew comparisons with the recent boom enjoyed by luxury sectors. “This year is the first year all my team tells me we need to grow first class . . . I never thought I would ever hear that”. Via [FT](#)

OFF THE BEATEN TRACK

THE WHAT?

More bang for the buck – Part 2

Macro Forces:
**IMPACTS OF
INFLATION**

Trends: **INEQUALITY &
UNCERTAINTY**

Uncertainty has become the only certainty. People in many markets are facing economic instability as currencies shift in value, inflation rises, supply chains continue to be disrupted, and governments change. Financial inequality, already a driver of change, worsened in the pandemic. In every corner of the globe, struggles to achieve parity based on gender, race, ethnicity and religion dominated headlines. Where can people turn to find confidence, and how can they minimise their risks in an uncertain climate? The effects of the cost of living crisis are not being felt equally by all parts of society, with considerable evidence that inequality within countries is continuing to rise, creating an even bigger layer of society that is vulnerable and disenfranchised

73%

wish they could slow down the pace of their life

47%

I am usually the first among my friends to try out new things

THE “SO WHAT”?

What might this mean for the TRAVEL & HOSPITALITY sector?

The natural tendency for “revenge spending” is in conflict with the cost of living crisis. As soon as people were able to travel once again they were suddenly confronted with a difficult and potentially long-term financial future.

This is being expressed as a “live for the moment” mentality and, within travel, one way this is being expressed is in “pushing the boat out” – really trying to enjoy their travel experiences to the full while at the same time maximising the return on travel investments. This means more pre-research (in order to reduce the chances of a bad experience) but also an interest in more interesting, unusual destinations and experiences. This links with several of the other trends we are seeing: such destinations generate more buzz when posted on social channels, and they also offer up more scope for luxe experiences.

We’ve seen growing interest in extreme destinations (such as dark tourism) as well as tourism to destinations recognisable through Hollywood or Netflix content. There is also a seeming counter-trend, whereby less crowded, more remote and inaccessible destinations are deemed more appealing, both for the more authentic experience they offer but also the perceived hero value for the effort involved in reaching them.

How can you offer your customers once in a lifetime, extreme experiences to set them apart from their fellow travellers?

WHO IS ALREADY ACTING

ON THIS? Novelty is key to drive standout



Adventures by Disney unveiled a new trip to **Colombia** that takes guests on a journey inspired by the hit movie Encanto. Launching in 2024, the trip will allow guests to immerse themselves in the country's natural beauty and diverse culture, exploring its lush rainforests, sparkling beaches, towering mountains, and bustling cities.

All organisations need to be aware of how the lives of the public are changing

We can help you leverage the trends:

Beyond this public report, get in touch with the Global Trends and Foresight Team to discuss:

- **In-depth analysis** of the trends or a specific market's attitudes – and how they will change
- **A custom presentation** tailored with data & signals for your organisation and key countries
- **Workshops & activations** to apply the trends to your strategic planning processes
- **Data access** through your Ipsos team, or directly via our Portal for up to 50 markets
- **Macro Forces** with supporting data, to feed into your own foresight processes
- **Market-specific highlights** to inform your global footprint and strategy

We can help you shape the future:

Beyond the trends, our advisory services in trends and foresight consulting include:

- **'Future of...'** foresight consulting to prepare for the obstacles and opportunities ahead
- **Trend Tracking** to monitor trend evolution and scale
- **Custom trends frameworks**, inspired by Ipsos Global Trends but customised for your organisation
- **Scenario building** and horizon scanning to consult with your organisation on preparation
- **Innovation sprints** to turn the trends into platforms for growth and to develop concepts



About Ipsos

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a True Understanding of Society, Markets and People. To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do. So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

GLOBAL TRENDS 2023

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GAME CHANGERS

