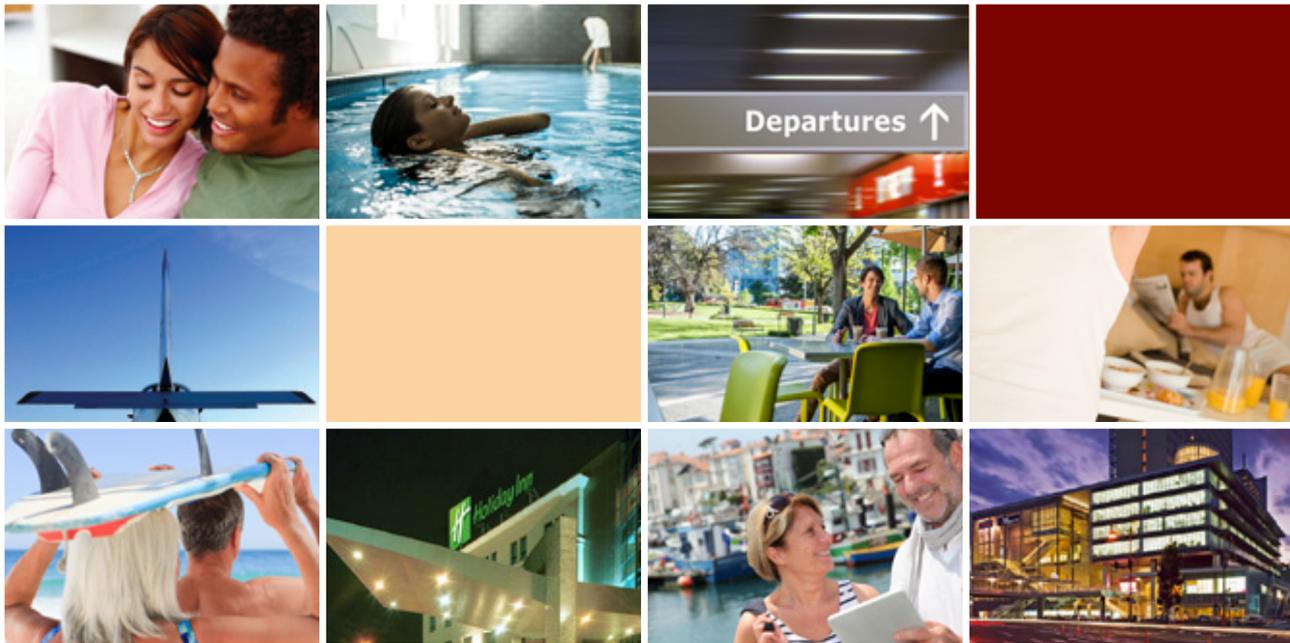


# The new kinship economy: From travel experiences to travel relationships





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# Preface

2013 marks ten years since IHG became a global, standalone hotel company, with the bold ambition to build and evolve the most preferred hotel brands around the world, delivering Great Hotels Guests Love. This anniversary offers us a natural point to look forward at how the world of travel is likely to change over the next decade, focussing on the people at the heart of our business – our guests.

We have spent time listening to them and studying consumer trends, both from within our own business and across the industry to see how travel is evolving. By understanding how the needs of our guests are changing, we can ensure that we continue to meet and exceed their expectations.

To this end, we have commissioned this report from The Futures Company, pulling together their own existing research and combined it with our own insight to identify the main trends that look set to shape travel over the next ten years. It explores the growing impact of technology on the guest experience and the emergence of new 'groups' of travellers, each with different needs. It looks at the status of cities, established and as yet undiscovered, as growing destinations in their own right. It considers the paradox between the fact of globalisation and the desire for increased personalisation from guests.

And, with travel now so integral to so many consumers' lives, experiences and identities, it suggests that we can no longer define the traveller in our terms - we need to take the time to understand and talk to them in their own language in order to build deeper, more lasting relationships.

So, how should these themes inform the way we innovate for the future? In order to meet guests' needs in this changing world, we need to ensure that as well as being industry-driven we are customer needs-driven. Our business has been built on pipeline, distribution and openings – still a vital focus for growth – but we must be demand-driven as well. Just as many of our guests no longer have a single focus for their trips, we need to be multi dimensional in our approach to building and retaining their loyalty.

Hospitality has always been about building relationships, but in the past, our industry has defined our relationships with guests in a very service-orientated way – 'Luxury', 'Midscale', 'Economy'. This report shows us a future where relationships become more of a currency in their own right, a 'relationship economy' where consumers expect a travel experience that feels relevant and unique to them.

For hotels, this means we need to redefine this service approach and personalise it so we can build social relationships with our guests at a deeper level.

In the future, brands will play an increasingly important role in this relationship economy. In the battle for the loyalty of our guests we must be clear on the needs that our brands satisfy. We will achieve that by ensuring that we understand our guests' needs and desires, what they want to know, experience, feel as well as the high level of service they would expect. Whether they are on a business trip, a romantic break or connecting with their families, we need to reach and engage them in new and relevant ways through brands that they can build a relationship with.

Within the IHG family we have brands with deep history and powerful heritage that guests know and love and that are instantly recognised by millions around the world.

In our 10<sup>th</sup> anniversary year we are working to fully realise the potential of the IHG brand as a whole.

We want our guests to continue to prefer our brands and understand that every one of them is a hotel that is part of the IHG brand family with the badge of trust and confidence that this brings.

**Richard Solomons**  
**Chief Executive**  
**InterContinental Hotels Group**



# Introduction

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This report analyses consumer trends to understand their impact on the changing face of hospitality. It brings together recent research on all aspects of travel and has combined them with insights from IHG and The Futures Company to, for the first time, comprehensively look at the different trends set to impact the next decade of travel. Its aim is to show that, when combined, these trends point to something bigger; they signal an emerging era for the hospitality industry globally – what The Futures Company calls the ‘kinship economy’<sup>1</sup>. Future growth in this context will not only come from products and experiences, but also from creating meaningful relationships among people. The kinship economy will be the next stage on from the “experience economy” of the last decade<sup>2</sup>. This offers a clear role for hotels in facilitating these meaningful relationships and providing the environments for them to flourish.

.....

The kinship economy brings with it exciting opportunities for both the travel and hospitality industries. We live in a world where almost every corner has been explored, where people can now ‘walk’ around Antarctica from the comfort of their living room thanks to Google Street View, or go diving in coral reefs courtesy of Google Earth. Travel will keep inevitably pushing further afield; the first test flights for commercial trips to space are expected in 2013. But even as travel ‘broadens’, there is scope for it to also ‘deepen’, as we rediscover the power of relationships along the journey.

Thinking about kinship helps us to think about relationships in a new way. Kinship is about understanding the connections between people and the process of forming those connections – whether that is the relationship between guests, their circles of influence, the local community or the hotel. The kinship economy is about helping people to make those connections.

Hospitality has always been about relationships. The word itself means ‘friendliness to strangers’. But how is the face of hospitality evolving as a result of social and consumer trends?

There are a number of changes in consumer behaviour that are relevant to the future of the hospitality industry – many of these appear as apparent “paradoxes” as they are the product of different trends in tension or colliding with each other. These paradoxes will affect the relationships travellers want to develop and how they want to discover them.

**The etymology of hospitality in many languages around the world is derived from the concept of welcoming guests: hospes in Latin or literally “being friendly to strangers”; haoke (好客) in Chinese or “to treat guests well”; and ukarimu in Swahili, “generosity”. Although the word hospitality in its sense of welcoming guests came into common use in the early Middle Ages, the hospitality industry goes back much further. For example, in Ancient Greece the hotel equivalent was a ‘pandocheion’ – these were facilities open to any person willing to pay the fees for lodging and food. The word meant “accepting all comers”.**

From new types of travellers versus the ‘multi-dimensional’ traveller, to independence versus personalisation, the success of the hospitality industry in the next decade will increasingly depend on understanding these new relationships and becoming better at facilitating and innovating around them.



2013

# THE CUSTOMER JOURNEY

The customer journey reflects the different stages of travel. This report will explore these in turn, highlighting key paradoxes that the industry is seeing develop as a result of social and technological trends.

In recognition of IHG's ten-year anniversary, we consider how the situation now compares with a decade ago and what this means for the process of nurturing and enabling relationships in the hospitality industry.

Looking back as well as forward helps put in perspective the environment the industry now operates in.

## WHO IS THE TRAVELLER?



### THE NEW GLOBAL EXPLORERS



### NEW 'FAMILY' GROUPS



### YOUNGER 'LAPTOP AND LATTE' WORKERS

**GENERATION Y**  
MAKES UP MORE OF THE WORKFORCE

**NO SET LOCATION**   **NO SET HOURS**

### EXPANSIVE MIDLIFERS

**60+**  
YEARS

BY 2023 THERE WILL BE **1 BILLION** OVER 60S

## PLANNING THE TRIP

## WHERE ARE THEY STAYING?

IN CHINA, RESEARCH MAY BE CARRIED OUT ONLINE BUT THE DESIRE FOR A STRONG SERVICE CULTURE MEANS CHOICES ARE USUALLY MADE FACE-TO-FACE



THE INTERNET ACCESSED THROUGH MOBILE DEVICES IS THE PREFERRED METHOD FOR PEOPLE IN MATURE MARKETS TO BOOK AND RESEARCH TRAVEL



**1 IN 4** TRAVELLERS HAVE USED SOCIAL NETWORKING SITES TO PLAN THEIR TRAVEL



TRAVELLERS WILL SEEK ORGANISATIONS AND VENUES THAT CONNECT WITH THE LOCAL AREA



THE NUMBER OF CITY TRIPS GREW BY 14% IN 2012

MORE THAN HALF OF THE WORLD'S POPULATION RESIDES IN URBAN AREAS



## WHAT'S THE EXPERIENCE?



SOCIAL MEDIA HAS CHANGED HOW WE SHARE OUR HOLIDAY EXPERIENCES - NOW IT'S ALL ON SHOW



## POST TRAVEL

THERE IS ALSO INCREASING DEMAND FOR PERSONALISED AND CUSTOMISED SERVICE - PEOPLE WANT TO FEEL SPECIAL



### THE INVISIBLE TRAVELLER:

BOOKS ONLINE   CHECKS IN VIA MOBILE

USES ROOM SERVICE   HAS EXTENSIVE KNOWLEDGE OF THE AREA

# Who is the traveller?

The first stop for this anniversary retrospective is to look at how travellers have evolved from the simpler, tightly defined profiles in evidence just ten years ago. There was the “business traveller”, jetting between meetings; the “holiday-maker”, away with the family; the “young backpacker” going it alone; and the “retired traveller” who had the time and money for a cruise. Although these profiles still exist, traveller identities are becoming “multi-dimensional”. The same people will play different roles on different trips, and sometimes will juggle multiple roles even on the same trip, such as the mother on a family holiday answering business calls from the beach, or the young independent traveller hoping to boost their employment prospects while still having fun.

It’s not simply a case of traveller profiles becoming multi-dimensional, however. Over the next decade, gradual demographic shifts will become more visible. This will change the face of the traveller.

The world is getting older and younger at the same time, but not in the same places. In mature markets, where the fastest growing population segment is people over 80 years old (which will quadruple in number worldwide by 2050<sup>3</sup>), we can expect to see this generation travelling more. On the other hand, many developing markets currently have a youth dividend; and many of these young people entering the workforce and having access to disposable income will be looking to travel outside their country for the first time.

Socio-economic development will also impact who is travelling in terms of country of origin. Already, 1.4 billion adults worldwide – or 30% of the global adult population – have sufficient disposable income to be able to travel abroad.<sup>4</sup> This number is set to grow as economic flows towards emerging markets expand the global middle-class.

These social trends are creating new types of traveller. This report will focus now on four of these: **new global explorers** from emerging markets; **new family groups** from both developed and emerging markets; younger **‘laptop and latte’ travellers** mixing business with play; and the **expansive midlifers** who are redefining older age.

“In the early 1990s, the typical Chinese outbound traveller was a male, middle aged business man travelling on official business. Now there is no longer such a thing as a typical traveller. Travel has opened up to so many more Chinese people: couples, friends, retired people, tour groups and independent travellers are all going abroad and travelling to a wider range of destinations.”

**Roy Graff, Managing Director of ChinaContact**



# The new global explorers

In terms of both volume and value, travellers from Asia are a new force in global travel. Asian travellers will account for one third of travel spending by 2020, an increase of 21% from today<sup>5</sup>, and the growth in Chinese tourism has been particularly striking<sup>6</sup>.

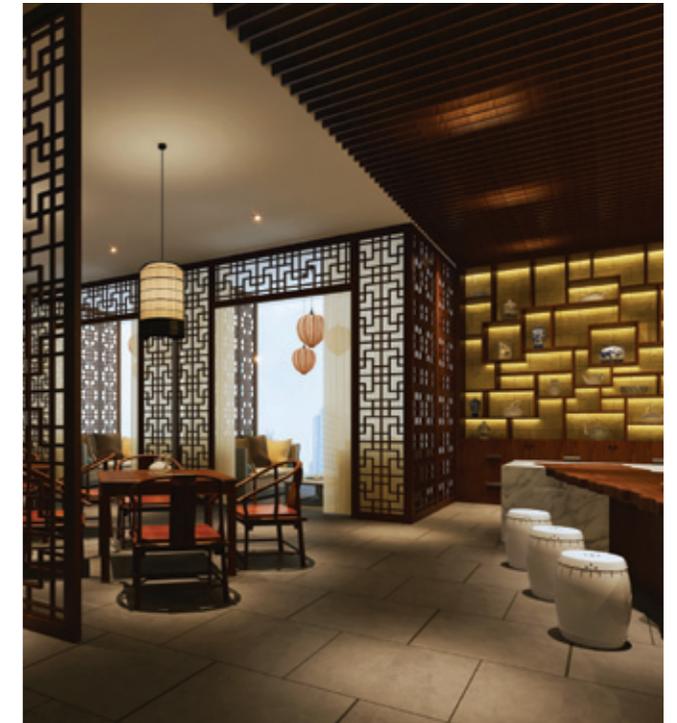
Over the coming decade, new explorers will become more regionally diverse as more people from the CIVET<sup>7</sup> countries (Colombia, Indonesia, Vietnam, Egypt and Turkey) and Africa start to be able to afford travel.

A decade ago, the number of international tourist arrivals from emerging countries was just under half the figure for arrivals from mature markets. Now the figures are almost equal.<sup>8</sup>



For these new explorers, travel is, on the one hand, a simple affair: those going abroad for the first time want to stay on the well-trodden path and see all the ‘must-sees’. And yet, it’s also subtly more significant: these travellers are looking for experiences that will enhance their status. A photo of a superb meal at a top restaurant is a source of pride as much as a memento or souvenir.

After a hard day of sightseeing, many of these travellers want to retreat to the sanctuary of a hotel that feels like a ‘home away from home’. Getting the balance between the unfamiliar and familiar is important. Many leading hotels are beginning to add Chinese menus, Mandarin-speaking concierges and in-room amenities such as Chinese tea and slippers. IHG, meanwhile, has gone a step further, creating HUALUXE Hotels & Resorts, the first brand designed exclusively by a local team of experts for Chinese travellers.



# New family groups

Only one in five US households is made up of the traditional 'mom, dad and kids' family, and one in four US Asian households is multi-generational.<sup>9</sup>

Across the globe, the traditional family unit is becoming more fluid in structure. Demographic shifts that have long been reshaping social units in mature markets are extending to emerging markets. In Asia, women are increasingly marrying later and putting their careers first. One in five Taiwanese women in their late thirties is single, a higher proportion than in Europe.<sup>10</sup> And in Western markets, extended family travel - traditional in emerging markets - is becoming more common.

These developments challenge the idea of a standard room layout. In Brazil, big family groups already hire out the entire floor of a hotel to stay together. In the InterContinental Samui Baan Taling Ngam Resort, it is common for a multi-generational family to rent several villas that share a pool. It's becoming more common for extended families from countries such as India, where disposable incomes are growing, to go away on holiday, creating more demand for these big spaces.

Eurocamp saw bookings of extended families grow by 325% between 2009 and 2011.

**MULTI-GENERATIONAL FAMILIES**



Other dynamics, such as the increase in single person households globally, suggest a need to re-think the desires of the independent traveller. The stereotypical image of the lone backpacker or the lonely business traveller no longer applies: the act of travelling is no longer their sole focus as they blend interests and personal development with networking and exploring the world.

"I see more people now travelling for an interest or hobby, whether that's salsa dancing or running a marathon. People increasingly seem to want to combine travel with their interests; they want to share, to learn, to improve their skills and they want to meet new people and see more of the world while they do so."

**Dr Miguel Moital, School of Tourism, Bournemouth University**

The hospitality industry will need to become more adept at simultaneously meeting the needs of all new groups. In the kinship economy, where relationships count for everything, hotels will need to better understand the new types of relationships between guests. The occasions and opportunities for interaction and relationship-building will become more important to them than lifestyle or 'lifestage'.

# Younger 'laptop and latte' workers

With Millennials (the generation born after 1982, sometimes referred to as Generation Y) making up more of the workforce, this generation is now challenging the norms of business spaces in hotels. Often with no set location, no set hours, these younger business travellers are used to not having an office – the office is wherever they happen to be – and they do not mind sharing working spaces as long as they have some privacy. They want creative, intimate environments where they can be productive without necessarily feeling they are working.

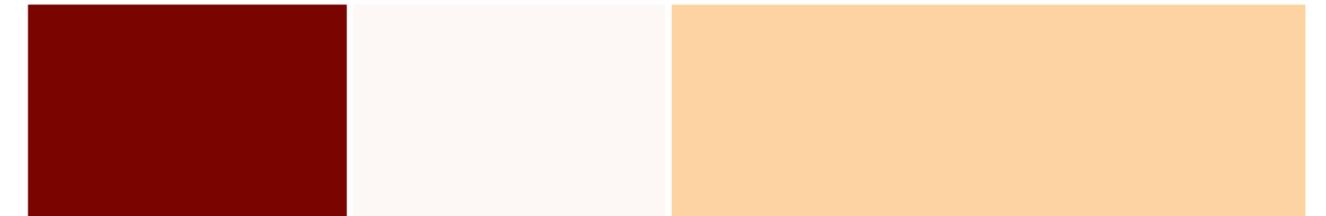
In the coming years, there will be a growing demand for 'latte and laptop' working lounges in hotels, where these new business travellers can enjoy the company of their fellow travellers while getting work done.



**MILLENNIALS**  
MAKE UP MORE OF THE WORKFORCE

NO SET  
LOCATION

NO SET  
HOURS



# Expansive midlifers

The number of older people worldwide is growing faster than any other age group. In 2000, for the first time in world history according to the UN, there were more people aged over 60 than children below age 5, and within ten years the over 60 population will pass 1 billion people.<sup>11</sup> As well as increasing in size, the economic influence of this demographic group is set to grow over the coming decade: it is estimated that people over the age 60 hold more than 50% of the wealth in developed societies, with a similar trend occurring in emerging countries.<sup>12</sup>

The appetite for travel is great among this group, often to make up for the more limited travel opportunities before ‘gap years’ and cheap flights abroad were common. In Australia, the ‘Grey Nomad’ movement has become so popular that some older travellers are selling their homes and investing in luxury trailers so they can roam the country all year long.

This group of travellers does not want to be identified purely by their age. Revolutionary medical research, healthier lifestyles, longer working lives and technology have resulted in an expansion of the ‘mid-life’ period and, as a result, age is increasingly just a number to the over 50s.

The key to unlocking opportunities for industry growth will therefore be to rethink assumptions about this traveller group. Hotels will need to be mindful of their changing outlook, identifying their emotional and intellectual needs, such as meeting like-minded people and keeping the body and mind stimulated. Older consumers do not want amenities or services that are explicitly ‘for older people’; this sort of labelling alienates. Hotels will need to develop products and services for all age groups while being supportive of older guests.

The ageing global population, of course, poses challenges for hotels as employers as well as service providers. As the average age of the workforce increases<sup>14</sup>, so hotels, like many other employers in the service sector, will need to reassess their assumptions on what older people can or should do as part of their responsibility at work.

Ctrip, China’s largest travel site, offers packaged tours for older consumers, featuring relaxed itineraries and low-sugar, health meals and special medical services – an approach that deals with the practicalities of age without highlighting them as age-related needs.

An increasing number of older consumers is expected to exert a significant effect on consumption. Accenture forecasts that in the US aggregate spending by the 65 plus age group is set to double from US\$1tn today to US\$2tn by 2030 and overshadow that of the 35-44 age group.<sup>13</sup>

SPENDING BY THE **65 AND OVER AGE GROUP** IS SET TO DOUBLE

Hotels have the opportunity to find ways to harness the experience, talent and knowledge of older employees – while allowing them the chance to follow their own travel ‘dreams’. In increasing numbers, older people will want both the income and the time to travel; they’ll want to continue to work – but work less.

The changing identities and aspirations of travellers pose new challenges for hotels trying to build long-term relationships. The opportunity lies in hotels becoming more agile in meeting the diverse, albeit sometimes conflicting, needs these new travellers have.



**60 YEARS +**

**BY 2023 THERE WILL BE 1 BILLION OVER 60S**

Paradox 1: There are new types of travellers as a result of shifts in demography and lifestyle. But even as new types of traveller emerge, they play different roles depending on the context. The identity of travellers is becoming “multi-dimensional” in this sense, and they are more likely now to have different, conflicting needs during the course of their hotel stay.

As these changes become more pronounced over the next decade, how can the hospitality industry continue to meet and exceed the expectations of all its guests?

# Planning the trip

Ten years ago, travellers were getting to grips with the opportunity to become their own travel agents. For many in developed markets, internet access at home was often slow dial-up and didn't favour the richly visual and dynamic sites that consumers visit today for holiday ideas. Low-cost airlines were opening up access to previously unknown cities for less money than it cost to buy a ticket to a football match – but booking the whole package online was still only for the brave.

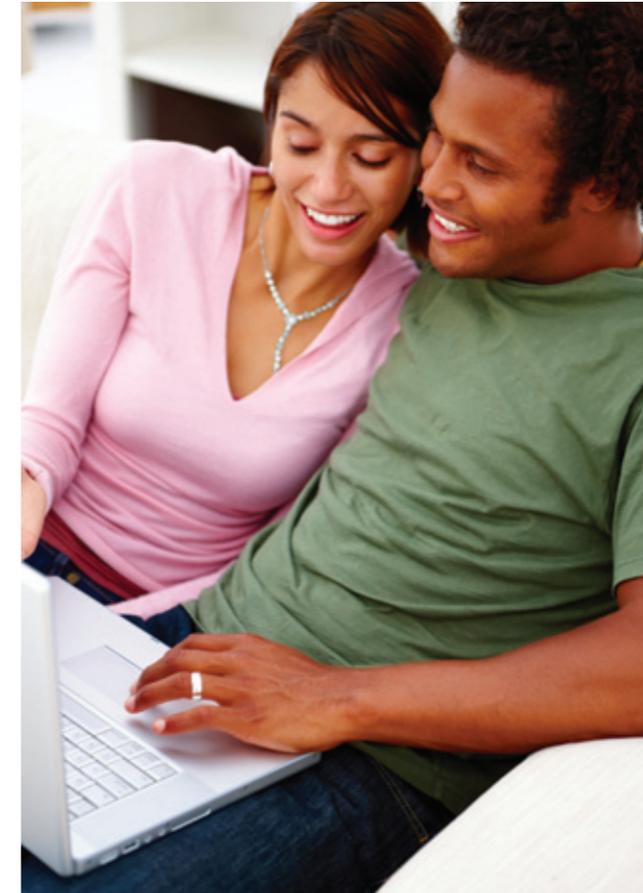
These days, the use of digital technology is different – in both scale and kind. The development of social networking and photo sharing means we now dream about travel more often – and these dreams are made social. Previously, planning a trip was a purposeful activity: it involved leafing through brochures, finding hotels and researching flight prices before booking. Now, however, as people browse friends' and acquaintances' photos on Facebook, they are being stimulated to think about travel all year round.

The internet – increasingly accessed through mobile devices – has established itself as the preferred place for people in mature markets to book and research travel. Online bookings now account for nearly half of these bookings, and figures for online travel sales in the USA are expected to show growth of 46% to \$145 billion for 2009 to 2015.<sup>17</sup>

“Ten years ago, there were three distinct stages to travel: pre-trip, during trip, and post-trip. Now, however, with the rise of social media we have a new stage – what we call the ‘dreaming stage’, which happens every time someone sees holiday photos uploaded on to a social networking site or reads a friend’s travel-related update. Social media is stimulating people to constantly and consistently dream about travel, even when they haven’t made any travel plans.”

**Dr Miguel Moital, School of Tourism, Bournemouth University**

Reports of the death of the traditional travel agent are exaggerated. While it is true that their share of bookings has decreased in mature markets, they are still behind one in three bookings globally. Even in mature markets, where trips have become more complex, getting specialist support can be valuable.



The hold of travel agents is strong in emerging markets, where online purchasing and international travel are relatively new to the majority of consumers and human interactions remain key. In China, research may be carried out online but the desire for a strong service culture means choices are usually made face-to-face. Industry experts estimate that about only 12% to 15% of tickets and rooms are booked online in China, and of that online market, approximately 70% to 80% of transactions are done through third-party intermediaries.<sup>18</sup>



**IN EMERGING MARKETS, ONLINE PURCHASING AND INTERNATIONAL TRAVEL ARE RELATIVELY NEW TO THE MAJORITY OF CONSUMERS**

In the future, travel agents across all markets will need to keep up with the changing demands and expectations of travellers as they get savvier, more sophisticated and more independent.

Financial constraints are also an issue. Low-cost airlines are now well established as a global phenomenon with leisure travellers, with the fastest growth in new markets in Asia. Now, some are even deliberately targeting business travellers whose travel budgets may be under pressure.

Spanish low-cost carrier Vueling has recently introduced the Duo Seat which keeps the middle seat of three free as part of the booking – this guarantees privacy and leaves more space for luggage for travellers.

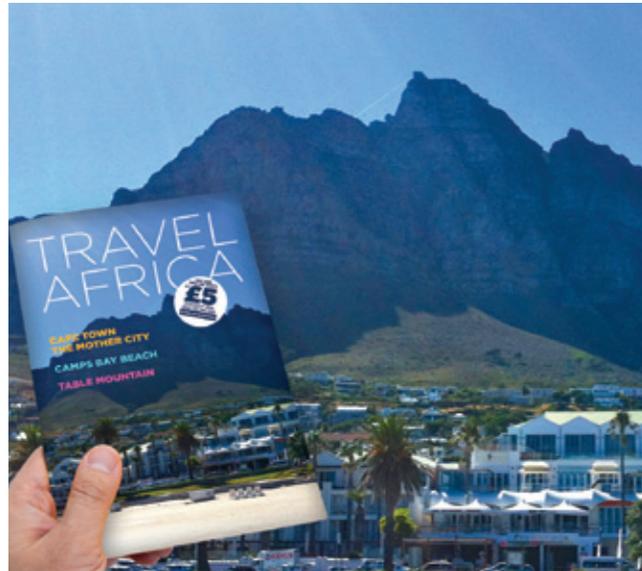
# Pre-emptive feedback

As we consult both official information provided by travel providers and unofficial reviews left by recent customers, we are becoming, in some ways, less open-minded about travel. One in ten consumers says their customer loyalty is based on their impression of the company before they even make a purchase.

Ten years ago, we relied on glossy brochures to fill our imaginations – and sometimes found that reality did not quite match up to our expectations.<sup>19</sup>

“In the preceding weeks, the thought of the island [Barbados], had circled exclusively around three immobile mental images, assembled during the reading of a brochure and an airline timetable. The first was of a beach with a palm tree against the setting sun. The second was of a hotel bungalow with a view through French doors. And the third was of an azure sky ... But on arrival, a range of things insisted that they too deserved to be included within the fold of the word Barbados. For example, a large petrol storage facility ... and a small plywood box where an immigration official sat ... and a confusion of taxi drivers and tour guides outside the terminal building.”

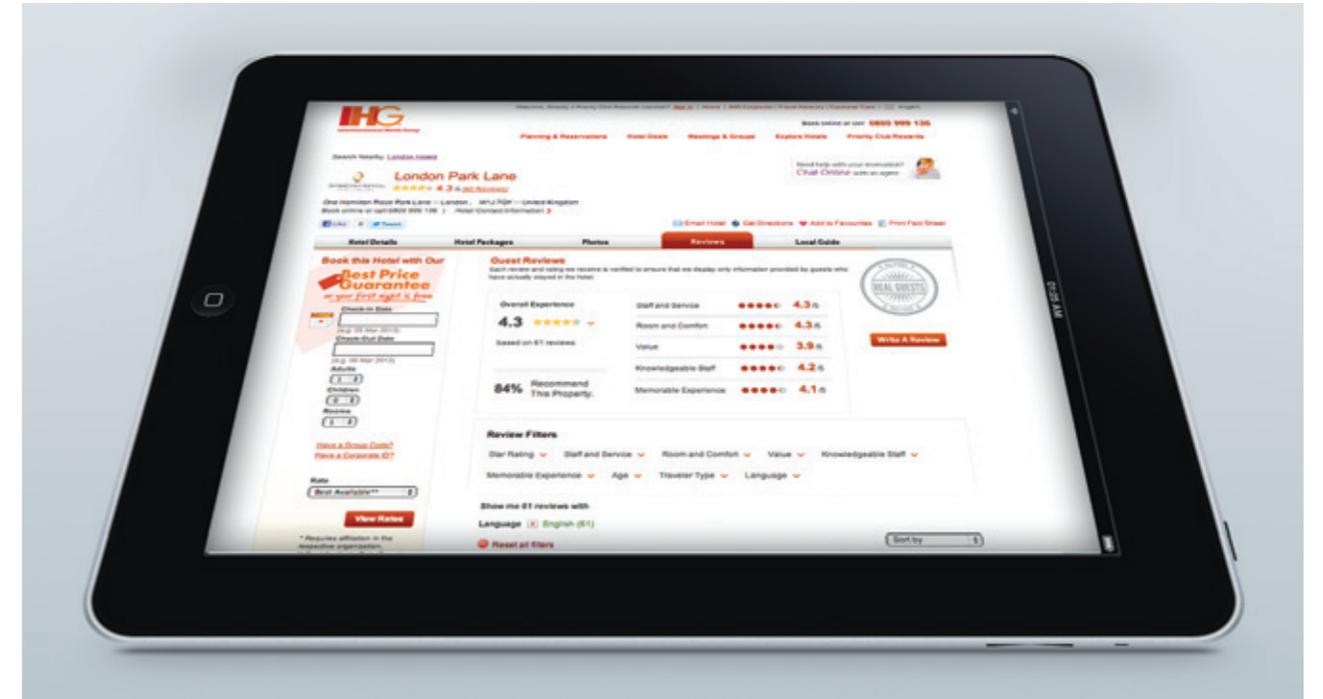
**Alain de Botton, The Art of Travel<sup>20</sup>**



**10** ONE IN TEN CONSUMERS SAYS THEIR CUSTOMER LOYALTY IS BASED ON THEIR IMPRESSION OF THE COMPANY BEFORE THEY EVEN MAKE A PURCHASE



Now we can use an ever increasing range of sites and apps to get the ‘warts and all’ perspective.



While it is good to minimise ‘nasty surprises’, travellers today risk feeling overwhelmed by the wealth of information available. Knowing whose opinion to trust becomes critical.

For the hospitality provider, trust is critical. It is known that ‘fake reviews’ are sometimes posted by individuals who have never had the travel experiences they describe. The challenge is finding a way to ensure content is genuine, while also maintaining impartiality. In October 2012, IHG launched a new system, ‘Real Reviews from Real Guests’, which verifies all reviewers against a database of actual bookings for all its hotels.

“Every time you open a guide for restaurants or cafés or whatever you find five completely different views and evaluations of the same place, and you only get confused. You need to have a dry, factual, objective description and then see the comments and advice your friends or people you know left about it.”

**Russian traveller, online forum discussing the impact of technology in travel.<sup>21</sup>**

# Digital baggage

The arrival of new technology also affects what goes in our suitcases when we pack. All that bulky paperwork – tickets, identification, itineraries, maps and resort information – will become a thing of a past. Instead, we can rely on our phones or equivalent devices to ‘carry’ it for us. Digital information is not only lighter and more convenient – it’s often also cheaper and better. Virtual guidebooks can be free, completely up to date, and allow travellers to search for information that reflects their own personal interests.

**Traditional travel publishing has been in decline in the UK over the last seven years: overall, guide sales have fallen by 30% during this period.<sup>22</sup>**

But there are more profound implications. No longer constrained to the set path of ‘top highlights’, more travellers are following paths of their own. They can make up their itinerary on the hoof, using their smart phone to help them out. Others look to their hosts for inspiration, which is why InterContinental Hotels has redesigned concierge areas to create a more consultative environment and introduced dedicated apps that share the concierge’s insider knowledge about the local area. Technology has changed the ‘learning’ and tools of discovery: travellers ask themselves ‘what can I find that is not in the guidebook or in the blog?’ Technology has turned the process of discovery into something more personally challenging and exciting.

Unique and intimate discovery is not the sole prerogative of the leisure traveller. Finding a way to cut through the stress, inconvenience and bland routine of business travel is becoming increasingly important. Millennial travellers expect more.

Like every industry, technology is changing the way consumers experience the world around them. This will impact their journeys from how they plan to how they interact with their destinations, offering opportunities for brands to help facilitate that adventure. Increasingly, business and leisure travellers will start carrying new high-tech ‘accessories’. New technologies such as Google Goggles will allow travellers to access live information such as restaurant recommendations from friends, as well as share travel moments almost instantaneously enabling non-travellers to vicariously feel part of the experience.

**Nectar & Pulse pairs up travellers with tourist soulmates to suggest truly local experiences in urban destinations. You can browse through profiles to find a match with similar tastes and preferences. Once selected, travellers are sent through the guide with the information right for them.**



**BROWSE THROUGH PROFILES TO FIND A MATCH WITH SIMILAR TASTES AND PREFERENCES**

**As major brands embrace the concept, and the technology becomes more accessible and mainstream, mobile augmented reality is forecast to generate 1.4 billion downloads by 2015.<sup>23</sup>**

Around the world, travellers have the resources to plan in minute detail each aspect of their trip. The risk is that doing so can sometimes remove the fun of the travel experience.

People still want to discover things for themselves and be recognised by their peer group for being ‘first’. Understanding this is fundamental to the kinship economy.



In this new economy, the medium of exchange is social currency. The hospitality industry needs to find ways of helping guests collect social currency to trade and use in building relationships with others. This could include helping people display and share their discoveries about a destination with others or helping them uncover information only locals have. Hotels may not always be directly involved in the interactions – but critically, they’ll be facilitating them across all points of the customer journey.

Customer-facing hotel staff are vital in this – developing relationships has always been a key aspect of their role, but with the development of the kinship economy, this becomes even more important. Hotels will have to find ways to help concierges build social currency that they can share with guests – and that guests can share with others.

Perhaps the most obvious and most challenging issue is maintaining the sense of discovery and adventure of travel. The idea of going elsewhere is less powerful in its appeal when every pillowcase has been inspected and reviewed. Seeking the unusual and the unexpected becomes harder to achieve. Enabling risk-free serendipity requires a careful balancing act.

**“Guests have a wealth of information at their fingertips, so they expect the concierge department to be as informed as they are – and then some! The importance of networking – contacts who can help make the impossible possible – is paramount in this day and age. We need to be one step ahead of what is ‘available’ online.”**

**Simon Rose, head concierge, InterContinental London Park Lane, member of Les Clefs d’Or**

**Paradox 2: There are more travellers who want to learn from the experiences of others, but on the other hand, still want to discover the world for themselves.**

**How can the hospitality industry help travellers to discover destinations and experiences for themselves through empowering them with choice and information?**

**How will destinations meet and exceed expectations with so much information accessible online?**

# Where are they staying?

Choice of destination and place to stay mirror short-term trends at one level and global forces on another. The recent popularity of Scandinavian thrillers has put Sweden, Norway and Denmark on the map for more travellers. The Danish Tourist Board is keen to promote 'The Killing' themed tours of Copenhagen.<sup>24</sup>



Trondheim, Norway

However, longer-term trends suggest a new picture – one in which cities feature prominently.

Ten years ago, the top five destinations for international tourists were France, Spain, US, Italy and China. Ten years on, these are still the top five – there has been remarkably little change in the global consensus about the 'must see' countries. However look a little deeper and we see intriguing changes afoot.

The 'must-see' places in these countries are changing. The global trend towards urbanisation is increasing the number and importance of city breaks. In Europe, the number of city trips grew by 14% in 2012.<sup>25</sup> Cities may well overtake countries in the minds of consumers – visiting Paris could become the focus, over visiting France.

**"In China, there are now more international airlines flying into the Second Tier cities such as Chengdu and Kunming. This is not only opening up new cities to foreign tourists, it is also opening up the outside world to the residents of these Second Tier cities."**

**Roy Graff, Managing Director of ChinaContact**

The most radical change that we will see this decade is a change in the number and type of cities that are tourist destinations. Places we haven't heard of yet – and, in some cases, haven't even developed into cities yet – will be on the map. Research from McKinsey suggests that some 400 largely unknown midsize cities in emerging markets will generate 40% of global economic growth over the next decade and beyond. Most of these cities will be in China and India – and 12 of the 13 mega-cities that will develop over the next 10 to 15 years will be in emerging markets<sup>26</sup>. Think of the success of Dubai as a tourist destination – and then think of that 12 times over.

The growing importance of cities as both economic and tourist powerhouses has implications for what 'local' means. With the shift of focus moving from rural to urban, and in the future perhaps to the neighbourhood, travellers expect to get 'the local' experience and expect to see engagement with 'the local' from global companies.

## The hotel in the community

As consumers learn more about the business behind the brand, transparency is becoming a prerequisite. People want more than good experiences; they want to know what an organisation stands for. They want authenticity. Travellers will seek organisations and venues that connect with the local area.

**"Luxury travel is becoming more about the authenticity of the experience, not the product. It's all about the detail that makes an experience feel personal and exclusive. Exclusivity now means experiencing life like the local people do, to discover what that is like for yourself, for example by spending a night in a remote tribe's village in Papua New Guinea."**

**Laetitia Fain, planning and design executive, Henry Cookson Adventures**

Innovative coffee shops in particular are seeing the opportunity to bring communities together and become known as a local experience, rather than just a retailer of hot beverages, for example by becoming the focal point for community news and events or exhibiting local art.

**Harris+Hoole, a new coffee chain recently launched in the UK, includes a community planner on the wall of its cafes. Customers are invited to mark up important dates and events they want others in the area to know about. Interestingly, this chain, originally a small family-owned business operating mainly in London's East End, expanded thanks to substantial investment from the supermarket giant Tesco. The recent public debate about Tesco's intentions shows how operating as a local player is more than about image and décor. It's about going to the heart of the business, its values and its operations.**



“Hotels could be used as local community hubs, for example with local bands and artists coming and performing, meaning that the hotel has much more connection with the community. This is why people like boutiques at the moment – people want to experience the local.”

**Stephen Johnston, innovation consultant.**<sup>27</sup>

For hotels, restaurants and bars that attract both local people and residents have never been more important. Guests appreciate the opportunity to interact and develop connections with local people, in addition to more distant travellers. For example, InterContinental Hong Kong hosts NOBU InterContinental Hong Kong featuring modern Japanese cuisine of the world-famous chef Nobu Matsuhisa, drawing in locals as well as guests.

“Before, people would feel guilty about eating in at their hotel restaurant, now you see hotel restaurants being destinations in their own right – something that locals want to come to. This is also good for the guests who don't feel like they're on an island. I think that this will be a trend we will continue to see. Similarly, hotel spas and gyms are contributing – many local people will use these facilities, too.”

**Nick Trend, commissioning travel editor, The Telegraph**

Relationships that bring value to all parties will be truly sustainable. Local sourcing is therefore increasingly a key point of differentiation. IHG's boutique brand, Hotel Indigo, serves locally sourced ingredients with properties partnering local suppliers from farmers and bakers, to brewers and coffee roasters. Local can also be about supporting the local workforce. In January 2013, IHG celebrated the opening of its 150th Academy in China. It creates partnerships with community organisations and education providers in local markets to offer skills development and improve and increase the employment prospects of the local population.

As well as the growing focus on local, there is also the community aspect of the relationship. Community awareness can be about stepping in to help during specific crises. The IHG Shelter in a Storm Programme makes use of the group's network of over 4,500 hotels to support communities in times of disaster. The programme includes the IHG Shelter Fund, which provides immediate assistance, including shelter, food, water and other necessities to people affected by natural and man-made disasters.

The newly built InterContinental London Westminster is an example of a hotel that reflects its local community. A stone's throw from Parliament Square, the hotel has been designed to include artwork satirising modern politics, and its Blue Boar Bar is named in honour of one of the oldest inns in Westminster's history.

The changing expectations and demands of tourists are creating new opportunities to build relationships in the community. Shreyas is a yoga retreat in Bangalore that encourages guests to engage in community service. This might involve going on a play date with visually impaired children or helping to build a new wall for the local school. The result is that guests feel like something more than just tourists – a virtuous circle for hospitality providers, customers and the local community.

## Urban tension

The urban population is increasing rapidly, especially in emerging markets.

In 2009, for the first time in human history, more than half of the world's population resides in urban areas. In 33 countries globally, 80% or more of the population live in urban areas.<sup>28</sup>

Urban spaces can be viewed in two ways by travellers. On the one hand, they are accessible thanks to good transport connections, and full of energy and bustle with many sites and attractions to visit. Their popularity has increased over the past decade as low-cost airlines have put new cities on the tourist map. On the other hand, cities can symbolise all that's wrong with modern life: pollution, pressure, stress, fatigue. Many consumers say they are feeling increasingly unhappy about the wider environment they live in.

In 2008, 59% agreed with the statement 'The world I live in feels like an increasingly hostile and uncertain place.' This had risen to 66% in 2012. Of the 21 markets included in the survey, those in South America appear to be most concerned, with levels of agreement at 83% amongst Argentinians. It's also a big issue in Turkey (82%).<sup>29</sup>

The city break is often the prime example of where the multiple needs of travellers converge. As has already been stated, straightforward single-focus travel is on the decline<sup>30</sup>: people are looking for as much as possible from each trip. The smart operators are responding to the multiple needs of guests by making urban resorts havens of calm and tranquillity. IHG has introduced the Sleep Advantage programme at Crowne Plaza that gives guests access to sleep experts and aromatherapy kits.

In the future, we will not always need to leave the city to seek solitude. Recent innovations in city and interior design are bringing nature back into city and, in doing so, have the potential to redesign the dynamics of city life. Paradoxically, city relationships might no longer be just about relationships with people, but about our relationships with the natural environment.

RECENT INNOVATIONS IN THE CITY AND INTERIOR DESIGN ARE BRINGING NATURE BACK TO THE CITY



Fancy stepping out on to a moss bath mat? A British designer came up with a novel idea for a living bath mat. A bathroom rug can be made of recycled latex foam mainly coming from vegetal sources. Each cell welcomes a piece of forest moss, and the humidity of the bathroom and the drops flowing from the body water the mosses.



Urban scene: emerging cities

On its 9th and 12th floors, Hotel Indigo San Diego Gaslamp Quarter is topped with green roofs planted with low-maintenance sedum plants. These reduce energy consumption by cutting the need for heating/air conditioning and lowering the urban heat island effect. In addition, there is a terrace herb garden supplying the Phi Bar and Bistro.

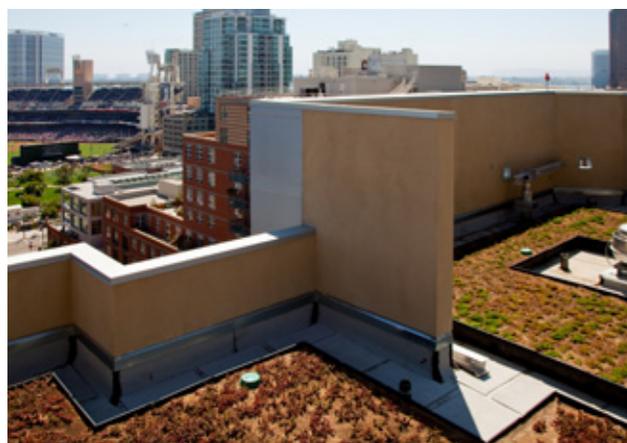


In the kinship economy, context is important. It can help – or hinder – the development of relationships. In 2013 and beyond, we will have the opportunity to help guests reconnect not only with cities but also with the wider environment.

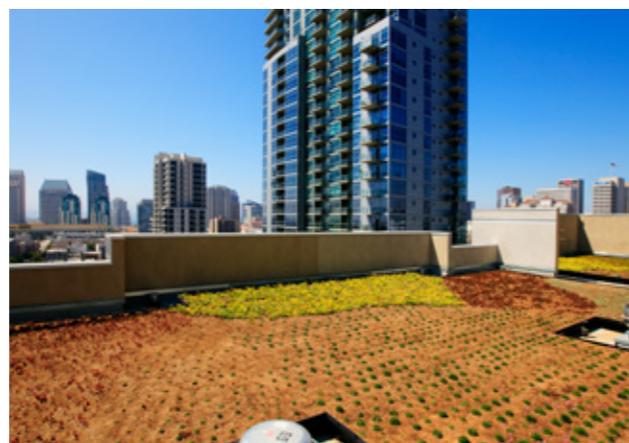
Those that understand how guests' interactions with places are changing will do well. A place to stay can focus on bringing the outside in, and help guests to feel that they are truly connected with the local area and culture. At other times, guests will be seeking a variety of different experiences and activities, not simply those determined by the immediate external environment.

Paradox 3: The city hotel is increasingly a place of escape for some guests, but at the same time it is also taking on a new role as a social facility for the local community.

How can the hospitality industry foster the relationships that guests want with the local community?



Hotel Indigo San Diego Gaslamp Quarter



## What's the experience?

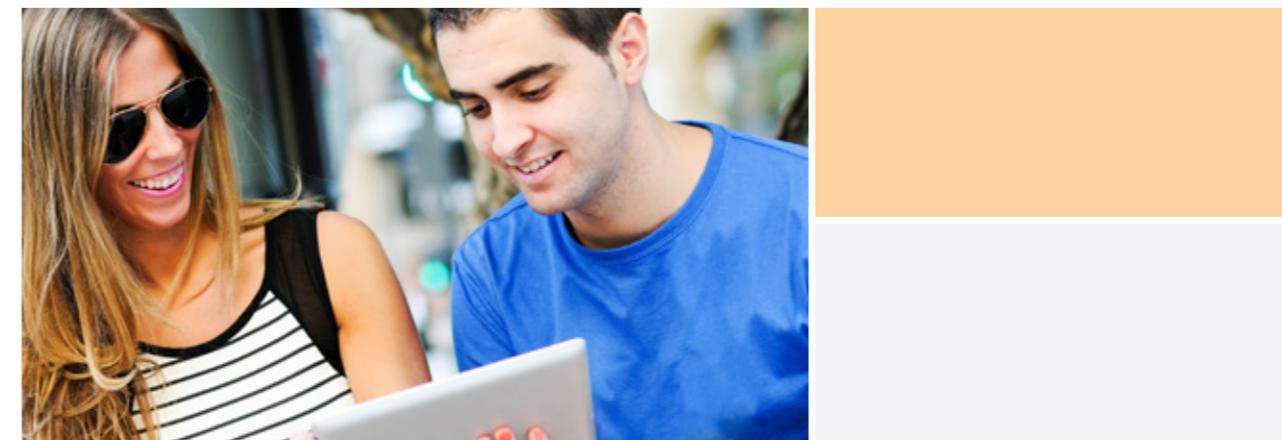
Ten years ago, 'virtual' travel was limited – meetings meant seeing people in the same location rather than via video chat. Travel information, even if retrieved from the web, was usually in printed form. Now, however, 'real' and tangible experiences are becoming overlaid with virtual ones. This is not blurring or replacing the 'real' experience; it is enhancing it and making it richer.

But as guests increasingly use digital tools to personalise their experiences, identifying their individual needs and responding to them becomes more challenging for the local hotel team.

Worldwide, consumers are becoming more independent – or, at least, more independent-minded. In response to the statement 'There is little I can do to change my life', 80% of global consumers disagree.<sup>31</sup> Consumers increasingly feel they should be working things out for themselves: 53% agree that becoming as self-reliant as possible will better increase chances of succeeding in today's world versus 47% who believe in seeking the help and guidance of experts or professionals.<sup>32</sup>

This trend towards self-reliance creates a new paradox for the travel industry. It means hotel staff need to balance enabling guests to manage on their own with the recognition that a helping hand will still be valued. The way to do this is to nurture relationships that have flexibility built in.

There are two different sides to this paradox, outlined below. The invisible traveller shows how hotels might lose valuable touch points with the customer, while predictive service considers the potential risks in making too much of personalised interactions.



# The invisible traveller

Making use of all the tools and resources available to them, today's customers can effectively travel without touching the sides. It is even possible to foresee a time when a guest might never interact with hotel staff, if they don't want to.

Think of this scenario. A booking has been made online. Once the guest arrives, they let themselves in (mobile check-ins are already in operation in some hotels). They use room service, not the restaurant – or consult the menu and place their order at a table fitted with an intelligent touch screen. The next night, they order a gourmet BBQ basket – and cook their own food. They've carried out their own extensive research about the local area and amenities, so don't need to ask the concierge staff for their advice.



These possibilities, however, do not lessen the opportunities for service – they create new ones. We need to capture the experience and insight of staff and find the right channel to share it with guests. In 2011, InterContinental Hotels and Resorts launched free Concierge Insider Guides: iPad apps which allow travellers to tap into the extensive knowledge of its concierges and the global destinations they know so well.

In the room, thanks to content downloaded on a personal media device, such as a tablet, laptop or phone, in-room entertainment options will evolve. We are likely to see 'Bring Your Own Devices' (BYOD) come to the hospitality industry in 2013 – much as they've come to the workplace. This will enable guests to personalise their experience. Playing music from your own MP3 collection or watching films recommended by your friends takes away the anonymity of the traditional hotel room. Indeed, recent innovations such as Apple's social TV make it possible to imagine that in the coming years, guests will watch TV in their hotel room 'together' with friends back home.

Samsung and Holiday Inn worked together on a high profile trial of new in-room technology during the 2012 Olympics. Guests at the Holiday Inn London - Stratford City were able to employ an app on the Samsung Galaxy S III to control their rooms' TV, air conditioning and lights. In the future, this might extend to directly handling communications with front desk, housekeeping and concierge staff, and even facilitate checkout.

## THE INVISIBLE TRAVELLER:



# Predictive service

Supporting those travellers who seek greater control is very important, but so is meeting the increasing demand for personalised and customised service.

We have to understand the traveller and their individual needs. Staff who speak multiple languages, chefs who can provide vegan meals at short notice, mid-day laundry services for late-arriving travellers – things like these will increasingly be among 'standard' requirements. To forge the right relationships, we'll need to make good use of personal data collected from the traveller.

An article in Fast Company early in 2013 describes how some companies are able to quickly provide personalised responses to customer queries. The author writes: "Just before Christmas I had my own encounter with the 'wow' experience when my casual tweet to REI [an American outdoor equipment specialist], 'What is the best gift suggestion you have this year?' was answered through a video. Not only the video was custom made for me, it was made within less than an hour."<sup>33</sup>



Compared with ten years ago, the opportunity to understand guests and respond swiftly to their needs has increased significantly. Digital transactions create 'digital crumbs' about personal preferences – it is easier now to 'remember' that a particular guest requests special foods when ordering in the restaurant. Improved connections and infrastructure mean these insights can easily be shared across the globe.

"The ability to read a guest and deliver an experience that exceeds their expectations is the key to providing consistent personalised service. People want to feel special."

**Simon Rose, head concierge, InterContinental London Park Lane**

Smart operators will know the best way to take advantage of the data captured by technology: how insights are actually used in interactions with guests is the crux of the matter.

Preferences vary – the kinship economy is rooted in human relationships and is therefore universal, but it does differ in expression. For example, culturally, the Chinese strongly value recognition and status as a symbol of success. However, they have also been taught to be humble with this.

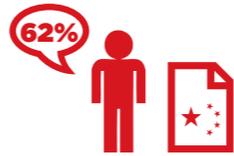
Other cultures value the feeling of being taken care of in a more understated way. In many developed markets, consumers report high levels of stress: they are under financial pressure, they are worried about their jobs and they work long hours. In these circumstances, a great experience is one that's stress free. Something as simple as not having to worry about the process of getting from the hotel to the airport can make a big difference.

Staff training is becoming more sophisticated in order to appreciate these subtleties. Some might argue that intuition and experience will go a long way, but, with technology giving more insight than intuition could ever provide, back office data and on-the-ground practical knowledge need to be brought together. This changes the way that hotel operators traditionally think about the roles of their staff, as it shifts some of the responsibility for where the face of the brand lies.

However, it can be important to avoid making the customer feel they're being watched or tracked. In some countries, concerns about personal data protection are growing.

A sense of balance will be key. Entering a hotel room to find all devices tailored to your name, favourite music and film and your fridge filled with your favourite brands of food and drink, mined from your social media profiles, may lead even the most affable traveller to feel a bit uncomfortable. Personalisation that surprises the consumer by 'knowing too much' can backfire.

Chinese travellers are more than twice as likely (62%) as travellers from the US to say that they are happy to provide more personal information in return for more streamlined and efficient travel.<sup>34</sup> However, in Germany, the vast majority (85%) of consumers agree with the statement 'I am concerned about data protection and privacy in the internet.'<sup>35</sup>



Traditionally, businesses focussed on customer service. Part of the evolution we are seeing now is the move away from a customer service model to a relationship model.

Under the old paradigm, the choice for customers would have been full-service or self-service. The hospitality industry must go further and rethink service in terms of what it means, not just for the customer experience but also for customers' relationships. How can service frame connections between people? How can it help those connections to be made? Success in 2013 and beyond will not come simply from knowing our guests better, but by knowing whether to act as a visible facilitator of connections or an invisible pillar of support.

**Paradox 4: More travellers are starting to travel independently without industry support, while others are actually demanding a more personalised experience.**

**How can the industry build relationships with independent travellers – offering an invisible pillar of support?**

**How can the hospitality industry balance the growing expectation for personalisation with the desire of some to remain independent?**



## Post travel

The final stage of our customer journey considers what happens once the trip is over. Ten years ago, digital cameras were relatively new. In 2002, only 20% of US households had one.<sup>36</sup> Instead, many people took pictures and then developed the film afterwards, reliving their trip as they made up their albums. Now, many people don't even own a camera – other than the one built into their phone.

Coupled with digital photography, social media has changed how we share our holiday experiences. It's all on show. Instantly. Younger generations no longer travel to 'discover' themselves, but to say something about themselves to their social peers. It may even be that these travellers now think about an experience in terms of how they will share it with others. For younger travellers, nothing is real until it is posted and viewed by someone else. Sharing gives truth to the travel.

Travel operators must consider how they can make sharing easier, accepting that this may have to be on the traveller's terms. Constantly thinking about the next status update changes the way travellers look at services and facilities on offer.

At the 2012 Olympics Games, Cadbury used dwinQ to provide photo kiosks, check-in stations, and 'Like' boxes connected to RFID (Radio Frequency Identification) enabled badges to allow guests to update their Facebook accounts. Around 50,000 people visited the Cadbury exhibit and captured memories that were automatically shared on their Facebook news feeds.

In the kinship economy, people share branded content primarily because they want to connect with and define themselves to other people. Through the sharing of branded content, brands can become part of the 'bloodline' between people. They feature in people's travel stories or photos uploaded to Facebook. A picture of a hotel can be used to form a link between people that, in turn, can form a connection, the beginnings of a relationship, with us. We become part of the story that travellers tell to others about themselves.

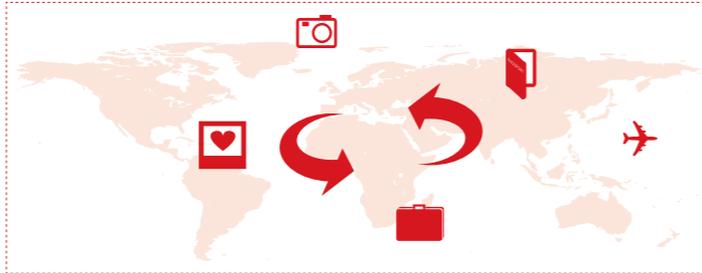
In the kinship economy, hotels should want to help their guests tell great stories. In this way, they will help guests make connections. The industry has a responsibility to make sharing easier for guests – and to help them tell the best story about their trip.



# Circular not linear

The fundamental dynamics of the customer journey are changing. It is no longer so clear when a travel experience begins or ends. Before they go, customers form opinions, reading about the experiences of others, and when they return, they provide feedback (reviews, etc) that shape the opinions of another set of prospective travellers.

One in four travellers have used social networking sites to plan their travel while 45% have made travel plans based on reviews and experiences of others. This is true of both leisure and business travel. One in three business travellers posts reviews online of properties they stay at.<sup>37</sup>



The industry needs to recognise that when customers are no longer physically present, they still have a relationship to nurture. Maintaining a point of connection with departed guests – for example, by making time to respond to reviews they have posted on company websites – will become more important in retaining customers.

Paradox 5: The divide between where one trip ends and another begins is blurring and becoming more circular, as people share more of their travel experiences with others.

How can the hospitality industry facilitate relationships between old and new guests? How can the industry continue to build relationships once the trip itself has ended?



InterContinental Toronto Centre, Canada



Holiday Inn Cordoba, Argentina

# Conclusion

So much has changed in the last ten years; people are now able to travel to destinations that had been inaccessible only one generation earlier, and the Internet has changed, and continues to change, how we discover the world around us. But some things however stay the same.

As Simon Rose, who first started out as a concierge almost two decades ago, and is now head concierge at the InterContinental, London Park Lane, observes:

“Ultimately, guests want to feel special. Irrespective of their motivation for travel, or the frequency of their time in five-star hotels, our guests want to make the most of their limited time. This hasn’t really changed in my time as a concierge. Guests want to make a connection with someone they deem to be an ‘expert’ and they want focused and efficient service.”

Perhaps the area of biggest difference is the widespread adoption of new technologies. This has brought our guests closer to us than ever before – and yet has made them more distant from us. Technologies have made travellers harder to define – think of the hotel guest who checks their work email before setting off for the beach.

But they have made it easier to get to know them – we can collect a wide variety of data about where they have been and what they have chosen. Some might argue that technology is cold and impersonal – but not if it is used to humanise the hotel experience and add depth to the countless interactions that occur every day across the world.

As we are presented with paradoxical expectations and demands, the metaphor of the kinship economy provides important principles to guide us through. We are all now operating in an environment in which relationships – and the process of building them – is the new currency.

There is so much possibility for future innovation in this new kinship economy. We need to start by reimagining, now, the role our guests and local communities want their hotels to be playing in ten years’ time. The role of the hotel in this future could be as a community facility or city retreat. Customer service in the future could become primarily about facilitating local or new connections and hotel rooms could be personalised to take into account guests’ social as well as individual preferences.

In the marketplace of the kinship economy, the social currency guests gain from their hotel stay is as important as the experience. This means creating experiences that people can share.

As IHG marks its first ten years as a group, we remain ready to identify and respond to the challenges and opportunities of the next.

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