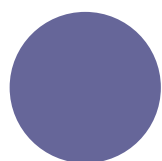


THE : FUTURE : LABORATORY

- : : MSC CRUISES
- : : THE FUTURE
GUEST EXPERIENCE



Foreword by Pierfrancesco Vago, MSC Cruises' Executive Chairman

One of the challenges of the cruise industry is that we need to design and build new ships that will still be appealing for guests 30 years from now. As such, innovation and consumer trends are at the very core of our DNA and we have to have a strong and clear vision for the future whilst combining this with our timeless style. The report that we have created with The Future Laboratory looks at the future holiday guest experience, how it will evolve over the next decade and how we are already applying many of these trends to our current ships.

We pride ourselves on the richness of our guest experience both on board and ashore as we bring together people from all over the world where they can meet new people, explore new places and discover new cultures along their travels.

In 2019 we welcomed nearly 2.8 million guests bringing together 180 different nationalities and our guest capacity is set to triple by 2027 as we continue to expand our fleet. As such, our guest experience needs to be transversal and appeal to a diverse demographic, relevant for the cruise guest of today and the future.

Innovation is at the heart of our business in terms of how we design our guest experience, our ships and also our ship operations. We want to provide our guests not only with a truly memorable holiday but also a sustainable one, so this is an intrinsic part of our innovation programme.

We've commissioned this futures report; to uncover how our guests may be cruising with us in 2030 and identify opportunities to further enhance the experience for guests travelling with us now and in the future.

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Experts

Naomi Leite – Lecturer in Social Anthropology at SOAS, University of London

Kameron Durham – Vice President of Guest Experience for the Los Angeles Stadium and Entertainment District at Hollywood Park (LASED)

Matthew Woodruff – Senior Vice President of Guest Excellence and Chief Brand Partner Officer at Hospitality Ventures Management Group (HVMG)

Part One: foresight overview: UHD experiences

In 2030, guest experiences will be ultra-high definition (UHD). Just as we look back on standard definition televisions with nostalgic surprise, noting how grainy and frankly unrealistic the picture was, we'll regard our current travel experiences in a similar way.

We'll have moved beyond the realms of what is now normal, and even possible, continually seeking more extreme experiences. Luxury will be hyper-luxurious, spas will be hyper-revitalising, entertainment will be 5D and beyond, and purpose-driven travel will be the norm. Once we've tasted these new levels of hospitality, there'll be no going back.

Making this future happen will be an exciting challenge for the industry over the next decade, as a series of technological, economic, social and cultural shifts drive the emergence of new behaviours among future guests.

As more guests enter the market as a result of globalisation – the number of international tourists across the globe is expected to hit 1.8bn in 2030, according to the UN World Tourism Organization – distance will be measured in hours not miles, with the traditional borders that once defined both the world and guests' expectations blurring. The attitudes of guests will have evolved; they will prize fluidity, freedom and cultural fluency above all else.

Hyper-connectivity, increasing urbanisation and demographic transformation will also mean the world of 2030 will be brimming with challenges, and opportunities, for the sector. Understanding future guests – their outlooks, needs and desires – will prove integral to being able to successfully harness these opportunities and combat the challenges.

'We often make the mistake of seeing tourism and the guest experience as something separate from daily life when, in fact, research shows us that it's deeply interconnected,' says Naomi Leite, Lecturer in Social Anthropology

at SOAS, University of London. 'It shapes what people want to go towards and what they want to immerse themselves in.'

With this in mind, the future guest experience will aim to provide experiences that resonate with individuals across a wide range of mindsets, communicating new perspectives that help them grow and progress. Brands must also consider the importance of the emotional and physical guest journey, offering an opportunity for discovery and self-improvement. Some 68% of British consumers now expect brands to help in their quest for betterment by making more of a contribution to their wellbeing and quality of life (source: Havas).

These considerations will drive innovation over the next decade, as we enter an era of UHD Experience. The cruise industry will sit at the forefront of this innovation, embracing creative, future-facing solutions to its unique challenges. 'The cruise industry has a bigger challenge than other holiday platforms because it's a contained environment,' says Pierfrancesco Vago, Executive Chairman of MSC Cruises. 'Through intelligent innovation and design, with a strong commitment to sustainable travel, we will be able to facilitate all kinds of future experience.'

MSC Cruises, in partnership with foresight consultancy The Future Laboratory, has conducted in-depth research to uncover and explore how this future guest experience will be realised. From the game-changing impact of hyper-personalisation to a renewed focus on conviviality and purposeful consumerism, we examine the trends that hospitality brands will embrace to develop experiences that engage, inspire and excite future guests.

Part Two: The future guest experience

By 2030, UHD Experience will be in full flow, providing future guests with experiences from which, once they've sampled them, there'll be no going back.

Future-facing innovations and concepts that lead us into this new era will have evolved from three major shifts among guests:

- : The pursuit of personalisation
- : A desire for conviviality
- : A demand for purpose-driven experiences

To fully explore the UHD Experience of 2030, in this report we investigate how the future will develop through these three lenses, and the major trends that brands will embrace to deliver on these fronts.

Chapter 1: UHD Personalisation

'Today, everybody is speaking about personalisation,' says Luca Pronzati, Chief Business Innovation Officer at MSC Cruises. 'A combination of big data, machine learning and artificial intelligence [AI] is creating new opportunities for brands to provide tailor-made experiences to guests.'

While personalisation in the past often proved gimmicky, the increasing ubiquity of these new technologies, from AI and advanced data analytics to the Internet of Things, is forging new expectations about how brands should be personalising their offers to individual guests on a more granular level. As Pronzati adds: 'It is hugely important to harness new technologies to enhance and enrich the guest experience, really identifying a true consumer need rather than a passing trend.'

By 2025, an average connected person anywhere in the world will interact with connected devices nearly 4,800 times per day – about one interaction every 18 seconds – up from an expected 601 in 2020, while the global wearable technology market is predicted to expand at a compound annual growth rate of 11% between 2017 and 2022 (sources: IDC/Seagate).

With this, a new generation of super-connected consumers will forge new expectations about how brands tailor experiences to them individually. 'As technology becomes even further integrated into our everyday lives, it's going to enable experiences to be digitally curated. Ten years from now, this will be commonplace,' says Matthew Woodruff, Senior Vice-president of Guest Excellence and Chief Brand Partner Officer at Hospitality Ventures Management Group (HVMG).

'The future will be hyper-personalised. Guests will enable brands to know them, their likes and dislikes. As a result, brands will be able not just to seamlessly meet, but also to exceed their expectations through the guest experience,' he says.

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Matthew Woodruff, Senior Vice-president of Guest Excellence and Chief Brand Partner Officer at Hospitality Ventures Management Group

01. Elastic Entertainment

New technologies are creating possibilities for entertainment that responds to real-world environments.

While, in the past, entertainment providers have created rather clunky personalised formats that rely on some form of consumer input, new, hyper-personalised entertainment formats are using the data trace of physical objects to adapt automatically to individual guests.

There is a growing acceptance of augmented reality (AR) and virtual reality (VR), with the markets for these technologies expected to increase to £130bn by 2023 (source: IDC/ Statista). VR and AR applications that suffered from network delays on 4G will be enhanced immeasurably by the massive capacity and speed of 5G, giving future guests access to a new, previously unimaginable, type of digital experience. VR and AR will become a new lens through which we view the world as we enter an era of everyday XR, a new, extended reality that’s part digital, part physical.

Advanced AR, VR and XVR (mixed virtual reality) technologies will facilitate a hyper-personalised entertainment future. Audi and Disney are early adopters in this field. In 2019, they launched the in-car VR platform Holoride. The prototype, Marvel’s Avengers: Rocket’s Rescue Run, transforms Audi’s E-tron crossover into a spaceship that moves through a fantastical world.

The content accurately reflects the real world, picking up cues such as when the car stops at a traffic light or turns a corner, and translating this into the storyline. The content is also tailored to reflect the terrain the car is driving in; so, for example, if the car was driving through a desert, the VR would take

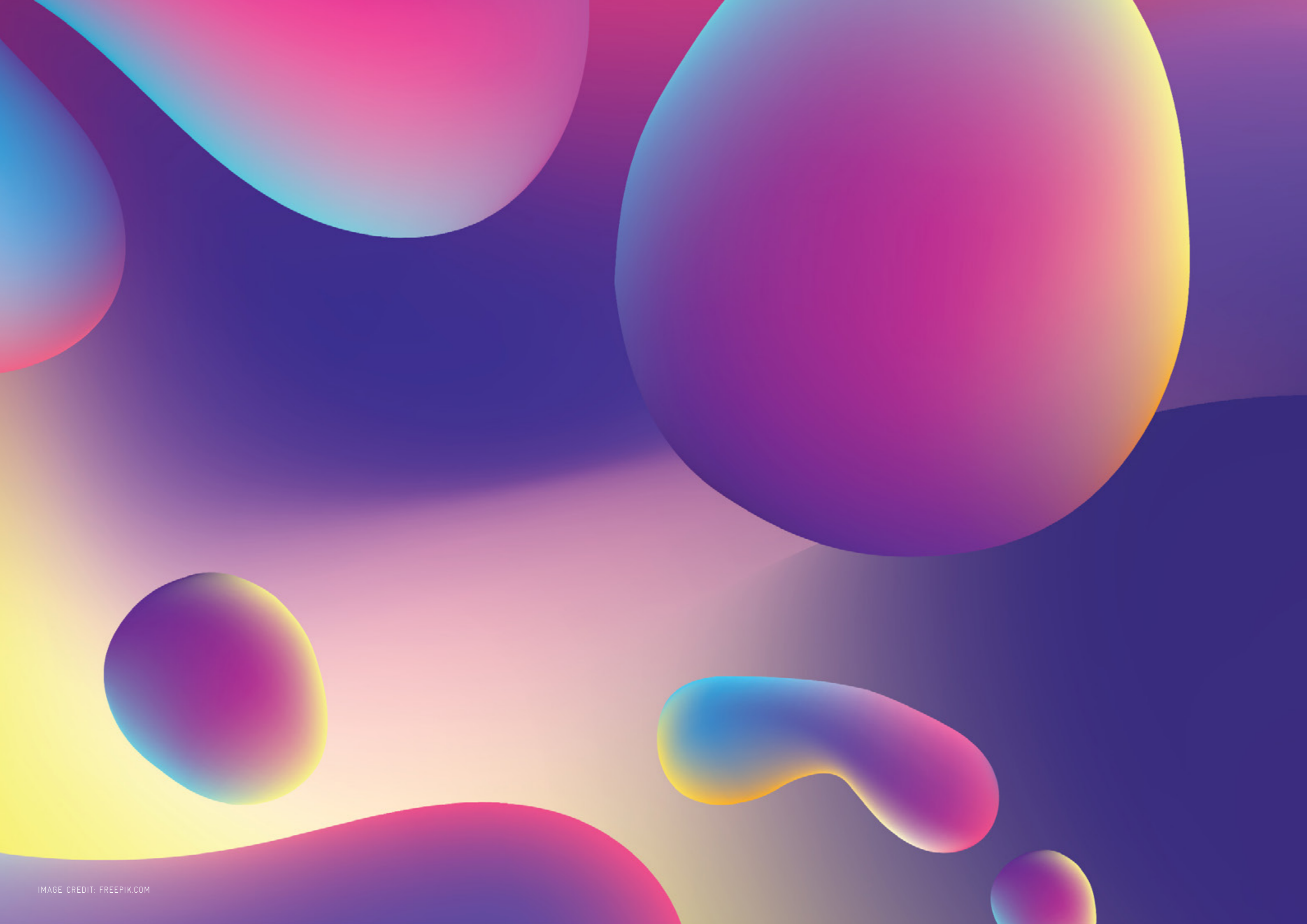
place in a similar location. Every Holoride experience is also unique because, even if the same route is followed, elements of the real-world environment will have changed with narratives tailored to last for precisely the duration of that individual journey.

By 2030, this kind of innovation will have become common in travel and hospitality settings, providing guests with hyper-personalised entertainment experiences – and MSC Cruises’ VR Maze, which enables guests to fight an evil Minotaur on deck, alongside other games, is one entertainment concept already paving the way in the sector.

According to MSC Cruises’ Head of Entertainment, Gary Glading, such a concept can appeal to guests across demographics. ‘The VR Maze was created in a way that makes it accessible to all guests. The technology enables people to see incredible, other-worldly things while walking around.’

With more than 13m AR apps built with Apple’s ARKit installed on smartphones since September 2017, according to app analytics firm SensorTower, the appetite for Elastic Content is likely to be strong. And by the end of the next decade, the emergence of new wearables will mean such concepts will be even more malleable and reactive, enabling brands to better shape the way that consumers experience the physical world.

Bose’s Frames glasses, for instance, add a completely personalised layer of aural augmentation to everyday life. Using a mix of sensors, they are able to perceive exactly where an individual is and what he or she is looking at, allowing for new travel, entertainment and educational experiences that extend a guest’s perception of reality.



02. Subconscious Design

In 2030, responsive technologies will seamlessly alter environments to individual guests' moods and emotions.

The global biometric technology market is forecast to be worth £48.4bn by 2025, increasing at an annual compound growth rate of 19.5%, according to a new study by Grand View Research. The widening scope of applications of biometrics in hospitality, primarily as a means of enhancing the guest experience, is set to augment the market, with players across the sector seeking to create smart technology-based environments that recognise guests' moods and automatically adjust in kind.

BioSay, a biometric platform that digitally measures data using a smartphone, hints at what this future might look like. Created by Rachael Donalds as a way to monitor her high stress levels, the platform records an individual's pulse and heart rate, and analyses facial expressions using smartphone sensors to measure his or her physical and emotional state.

By 2030, this functionality will have been combined with AI and smart technology to create subconsciously adaptive environments. Japanese technology start-up Neuroware, for instance, recently launched its intelligent lamp Notte. Users can speak out loud to the lamp, reflecting on their day before going to sleep. Through AI and voice tone recognition, Notte is able to assess how the user is feeling and will change colour accordingly.

In Stockholm, meanwhile, digital marketing agency Clear Channel has created The Emotional Art Gallery, a project that uses data including Google searches, news articles

and traffic information to analyse commuters' mood and selects the most appropriate artwork to help lift the city's collective spirit.

While light hues and visual cues will form the early basis of Subconscious Design, the role of sound will become increasingly important by 2030. With an 86% correlation between how a sound subconsciously makes you feel and your conscious desire to have that experience again or avoid it, according to sonic studio Man Made Music, it will be a powerful tool for hospitality brands.

According to Kameron Durham, Vice President of Guest Experience at the Los Angeles Stadium and Entertainment District at Hollywood Park (LASED), a holistic sensory approach will be integral to successfully immersing future guests in new environments. 'The guest experience in 2030 will be something that engages all of the senses,' he says. 'Doing so will enable guests to feel fully immersed and part of something in a completely personal way.'

Towards the end of the decade, the adoption of this technology will have led to the creation of an all new, fully seamless and hyper-personalised sensory experience for guests.

Upon walking into a future cruise cabin, for instance, a modular, real-time control infrastructure, with biosignal sensors that track heart rates and facial expressions, will adjust light and temperature for maximum comfort, self-regulating on the basis of a guest's subsequent activities. Walls adorned with smart materials, meanwhile, will act like living art, changing to create a visually immersive environment aligned with a guest's emotional state.

'The guest experience in 2030 will be something that engages all of the senses, doing so will enable guests to feel fully immersed and part of something in a completely personal way'

Kameron Durham, Vice-president of Guest Experience at the Los Angeles Stadium and Entertainment District at Hollywood Park

03. Data ID Wallets

As lives become more digitally dependent, guests are generating huge amounts of data that brands will use to understand their desires, at times arguably even better than they do themselves.

Speaking at Web Summit 2017, Intel CEO Brian Krzanich estimated that by 2020 the average person will generate 1.5 gigabytes of data per day, and this wealth of information is eradicating any remaining distance between brands and consumers.

‘Advances in the ability to capture and collect data give us the opportunity to form closer, more intimate relationships with individual customers at scale,’ comments Rob Markey, Head of Bain & Co’s Global Customer Strategy and Marketing Practice.

This means that in 2030, spaces that guests inhabit – from cruise ships to boutique hotels – will become data touchpoints, able to track and monitor shifts in guest behaviour, and better inform products and services on offer.

For brands in the hospitality sector, the journey towards this level of data capture is already under way. ‘We already have more than 3,500 sensors on board our ships, enabling guests to be guided around and find different points of interest,’ says MSC Cruises’ Pronzati.

By 2030, this mapping data will be combined with guests’ personal data, collected during the booking process or through branded apps. Plugged in to advanced analytics systems, it will enable hospitality brands to better reflect guests’ needs and desires in real time, from offering more relevant products to better targeting their services. Staff armed with these insights will be able to provide unmatched

levels of personalised service. And towards the end of the decade, branded in-room AI assistants or smart wearables will also act as conduits for this data, providing guests with the information they are looking for.

MSC Cruises is leading the way towards this future with ZOE, the world’s first virtual personal assistant for cruises. Positioned in each cabin, ZOE speaks seven languages, with more than 30 international accents and over 2.2m questions analysed during its development. The device can help guests find out what’s happening on board and provide practical information. The voice-enabled device learns in real time using AI, and work on the evolution of ZOE is under way so that the device will be able to respond proactively, tailored to each guest’s preferences.

The appetite for this kind of innovation is already high, with 80% of consumers believing that voice control will soon become part of daily life, and two-thirds (66%) saying that digital assistants save them time (source: Bing and eConsultancy). By 2030, the capabilities of these smart speakers may include providing curated playlists and media content, or taking guests through personalised, wellness-focused meditation exercises.

On a positive note, the benefits to guests are likely to enable any privacy concerns to be easily overcome. More than three in four US consumers (76%) already indicate that they would share their information to receive personalised offers (source: Valassis). As we reach 2030, this openness will be fully harnessed by hospitality brands who will use guests’ Data ID Wallets to create a truly dynamic, seamless and hyper-personalised guest experience.



04. Personal Palates

Armed with detailed information on people's food preferences, allergies and intolerances, in 2030 hospitality brands will tailor menus to individual guests and provide choice like never before.

A combination of ethical and health concerns is driving dietary change across the globe, as a growing number of consumers switch to plant-based diets and adopt niche clean eating. The global substitute meat market is expected to grow by 8.4% a year to £4.2bn by 2020, according to Allied Market Research, while the global retail market for gluten-free foods is set to reach £3.8bn in the same year (source: Euromonitor).

Alongside clean eating, new mindsets also include a rejection of fad diets and a one-size-fits-all approach to food, as well as a growing awareness of the science behind the things we eat and drink. All of this serves to create new challenges for the hospitality sector when it comes to dining, as hospitality brands seek to cater for an ever-changing dietary landscape.

By the mid-2020s, brands will begin to harness new technologies, including AI and machine learning, to achieve this end. McDonald's, for instance, has acquired technology company Dynamic Yield and plans to harness its machine learning and AI to personalise drive-through menus. In the future, menus will change automatically depending on the customer, using multiple factors such as the weather, previous orders, current time and local events to customise choices.

Applying this functionality to a hospitality setting will enable brands to deliver a seamless, personalised and more efficient experience for guests – something that can create strong connections between brands and customers. 'Knowing what guests like and creating dishes that satisfy their tastes and preferences would represent a phenomenal guest experience,' says HVMG's Matthew Woodruff. 'For those who achieve it, it's going to build incredible loyalty.'

Towards the end of the decade, the most future-facing brands will be taking Personal Palates even further by delivering dining options that aren't just tailored to guests' preferences, but are completely individualised based on their biology.

Habit is a food delivery company already working towards this, offering DNA and nutritional testing to all of its customers. Subscribers provide a cheek swab and blood sample from which the brand identifies the foods that are most beneficial for the individual in terms of his or her metabolism and nutritional needs. Once the data has been analysed, Habit groups all customers into one of its seven diet types and tailors its ready-made meal service to best meet their health needs.

This kind of gourmet genomics represents the ultimate personalised guest experience in which, before arrival, your diet and nutritional menu are meticulously designed. And this future can't come soon enough for the increasing number of health-conscious travellers, from vegans to paleo dieters and those with food intolerances.

05. Optimised AI Wellness

By 2030, wellness will be optimised to each individual guest through data analysis and AI, offering everything from tailored workouts to personal sleep programmes.

The abundance of choice in the wellness sector is creating confusion rather than providing answers. Over the next decade, this will lead future guests to seek a more scientific, medically assured approach to wellness, with personalised, tailored experiences increasingly in demand.

'In this health-conscious society, you have to cater for consumers' desire to better themselves, whether they want to monitor their activity levels or track their diets,' says LASED's Kameron Durham.

Technologies like AI are already helping brands to forge a more meaningful relationship with consumers in their own homes as they continue their quest for betterment, and soon they will be co-opted by hospitality brands to enhance the guest experience.

Kaia Health, for instance, has developed an AI-powered app that uses motion-tracking technology to help people get fit, with a virtual personal trainer guiding users into the desired poses through real-time personal audio feedback and video instructions. North London's The Engine Room, meanwhile, offers body and fat testing, which guests track during their fitness journey using the brand's AI-powered app.

As consumers adapt their lifestyles to counterbalance the stresses of 21st-century living, sleep, as well as physical fitness, will become a significant subset of the expanding wellness market. For example, the global circadian rhythm sleep treatment market – encompassing sleep disorder treatment devices and drugs – is set to expand at a CAGR of 4.7% by 2028, with sleep seen as

one of the three pillars of health (source: Persistence Market Research).

With sleep playing a fundamental role in life-long wellness, premium fitness brand Equinox has launched a Sleep Coaching programme, offering one-to-one sessions to help clients evaluate their sleeping habits, implement better behaviour and clearly track their sleep progress against an end goal. Furthermore, at its recently opened hotel in New York, guests have on-demand access to certified sleep coaches who can offer guidance on getting optimal rest.

The impact of such innovations on the guest experience will be revolutionary. JD Power's North America Hotel Guest Satisfaction Index Study found that 71% of guests who get a better-than-expected night's sleep would stay again with the same brand. According to Jennifer Corwin, Senior Manager of Consumer Insights for Travel and Hospitality Intelligence at JD Power, 'Of all the discrete variables of the hotel guest experience we measure, a better-than-expected night's sleep is the one with the potential to drive the highest levels of overall guest satisfaction for those hotels that can deliver.'

And this development will have a cross-generational impact. The creators of Pokémon Go, for example, are launching the youth-focused Pokémon Sleep in 2020. The mobile app will act as a sleep-tracker, monitoring how long users sleep and when they awaken, with next-day game play affected by how long they have slept.

MSC Cruises, meanwhile, is working with the European Sleep Centre to analyse the sleep of its guests in different types of cabin while at sea. The company plans to use this data to inform future development decisions and to create a sleep-optimised cabin with ideal conditions for a good night's sleep.

Chapter 2: UHD Conviviality

By 2030, distinctions between digital and physical worlds will have entirely blurred, as our digital and real lives merge. And across the globe, a connectivity explosion will mean technology will be cemented as the core way through which we communicate. At present, 91% of business organisations plan to deploy AI within the next three years, which means that by 2030 one billion service tickets – or customer support requests – will be raised automatically by customer-owned bots rather than people (source: Gartner).

While this connectivity will improve lives through access and efficiency, it will also lead to a backlash, causing guests to seek human connection once again, according to University of London's Naomi Leite. 'Despite the fact that we are better connected than ever, people – whether consciously or not – are experiencing a kind of dehumanisation. Everything is online, digital, fast and over-saturated with information, and less and less about face-to-face, slow contact with other people.'

As a result, UHD Conviviality will emerge as a key tenet of the guest experience, encouraging guests to both connect with one another and reconnect with themselves. A focus on human-centricity will allow cultural and demographic barriers to be overcome, enabling connections to be made in dining, entertainment and wellness experiences, while technology will facilitate real-life moments of social serendipity.

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Naomi Leite, Lecturer in Social Anthropology at SOAS, University of London



01. Anthro-painment

The 2030 guest experience will offer human-centric entertainment that places people at the heart of a show, focuses on the creation of new connections, and is accessible to all kinds of guests, regardless of age gender or nationality.

By 2030, developing countries are expected to contribute more than two-thirds of global growth (70%) and half of global output, according to HSBC, opening up consumers in emerging economies such as China and India to travel opportunities like never before. One in six people globally, meanwhile, will be over 60 (source: UN). This, combined with a hyper-connected world making travel more accessible, will force brands to focus on human-centric entertainment that breaks down geographical, cultural and demographic barriers.

The Loong Swim Club is a good example, opening a wonderland-inspired leisure club in the city of Suzhou. Experimenting with proportion and eye-catching candy colours, the club's design from architecture firm X+Living was created to have a cross-generational appeal, and to chime with parents and children alike.

This seemingly simple, but hugely impactful, focus on human design is also being used in a collaboration between MSC Cruises and Lego. 'In our partnership with Lego, we are working on new room and club concepts that appeal to kids and parents together,' says Matteo Mancini, Corporate Kids Entertainment Manager at MSC Cruises. 'We understand that some activities are of universal appeal, giving parents the chance to come in and play with their kids in optimal environments.'

Beyond the design of entertainment spaces, immersive concepts like audience-driven

theatre will offer guests in 2030 next-level escapism. MSC Cruises' Spy Mission, for example, enables young guests to become immersed in a roaming spy experience, where they are led through different scenes on the ship to follow clues and solve the mystery. The brand is also looking at other forms of interaction.

'In theatres on board, we're exploring the potential for more interactive game shows where people have the opportunity to vote for certain things through smart devices,' says MSC Cruises' Glading. 'It enables guests to feel more involved, immersed and invested in the entertainment. One of our newest Cirque du Soleil at Sea shows is based entirely around the audience and their interaction with the artists – completely audience-driven and designed to engage with people of ages from all nationalities, regardless of language. We expect to see much more of this in our future entertainment experiences.'

Typically offered on a pop-up or limited-run basis, new spaces are being purpose-built to host shows designed to immerse and disorientate viewers. The Jian Li Ju Theatre, for instance, envelops the audience in the show, placing them centre stage with their own lines to learn and costumes to wear.

In a predominantly digital world, in which we often over-indulge our narcissism, this form of entertainment enables people to engage as active participants rather than passive viewers. According to Naomi Leite, this kind of engagement has the best chance of appealing to a global range of guests: 'The more interactive, while still allowing people a sense of control and security, the better.'

02. Zonal Design

In the coming decade, brands will seek to meet guests' increasingly diverse needs and desires through a focus on zonal design. With this, we'll witness the creation of multi-modal spaces that adapt to work and play, private time and socialising, and activities and relaxation.

'Whatever guests leave behind shapes what they want to go towards,' says Naomi Leite, highlighting how unique each guest's needs and desires are, and the subsequent need for spaces that facilitate all kinds of behaviour in a diverse future.

As a result, a greater emphasis will be placed on public space and how it is used. MSC Cruises' Yacht Club, a premium-access area where guests have a private section of the ship, is an example of this in action, enabling one space to cater for many types of experience.

By 2030, hospitality brands will have taken lessons from the workplace sector, which is now pushing the boundaries when it comes to multi-modal spaces. Ikea's innovation lab Space10, for instance, has panels that can be added or removed to change the office interior from private cubicles to an open meeting room or a semi-open shared area, giving employees a greater degree of control. Meanwhile, furniture concepts like Soft Work, a modular seating system, includes pivoting tables and power sockets between the seat cushions, enabling diverse seating and working positions.

As we move through the next decade, this ability to adapt spaces to fit guests' moods will become in-built. Future cruise ships will resemble neighbourhoods and latterly mini-cities, home to quieter suburban spaces, as well as open, social spaces designed to encourage conviviality.

MSC Cruises' newest cruise ship prototype, World Class, is based around this concept. The size of the ships has enabled architects to create distinct zones, each with their own ambience and experience, from a tranquil zen zone to a bustling open promenade with entertainment, shops and bars, and a distinct family zone that houses all of the facilities for kids.

'Brands are trying to create reasons for guests to leave their rooms and experience public spaces, whether it's to interact with other guests, to get work done or to relax and have a locally sourced drink,' says Matthew Woodruff. 'Using space in different ways can also enable brands to cater for several distinct customers.'

Towards the end of the decade, in the social spaces so integral to the future of the guest experience, technology will alter environments to encourage and inspire conviviality, as AI-powered lighting, temperature control and even partitioning create optimally social environments based on the data of future guests.

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‘When people talk about having an amazing experience, it is often that they connected unexpectedly with people, with a place or with themselves’

Naomi Leite, Lecturer in Social Anthropology at SOAS, University of London

03. Serendipity Tech

A new wave of innovations will lead to the creation of virtual lobbies that enable people to make unexpected, serendipitous connections with fellow guests.

Serendipity Tech will invite guests to leave their inhibitions at the check-in desk and embark on chance encounters, connecting like-minded guests with each other, from kids looking for play dates to adults seeking to network.

‘When people talk about having an amazing experience, it is often that they connected unexpectedly with people, with a place or with themselves,’ says Naomi Leite. With Serendipity Tech serving to encourage these connections ‘guests can come out of themselves and feel more alive by being connected to others in this way’.

MSC Cruises is already paving the way towards this future, with an analogue solution designed to help guests make connections with one another. ‘We’re providing guests with the opportunity to make a reservation for dinner with people from different countries,’ says MSC Cruises

CEO Gianni Onorato. ‘We believe that if we sit together three couples who have never met in their lives, who are from different countries, they will be able to communicate.’

By 2030, technology will be used to service this kind of interaction, with app-based virtual lobbies encouraging conviviality between guests. Exclusively available for those staying at The Standard’s High Line boutique hotel, The Lobby app is an early example of this in action, encouraging guests to create a digital alias, revealing as much – or as little – about their identity as they wish. They can engage in chatroom conversations with other guests at the hotel or invite them to meet in real life in one of The Standard’s social spaces.

Taking a more structured approach, Life House Hotel has built an app that enables guests to see who else is staying there and interact with them in advance of checking in. ‘If you think about hotels, they’re just big boxes filled with people that don’t know each other,’ says Rami Zeidan, co-founder and CEO of Life House. ‘Yet most guests are looking to meet or interact with others.’

04. Communal Transcending

Dining in 2030 will transcend the table, as restaurateurs use food, theatre and technology to transport groups of guests to new cultural and convivial environments.

Eatertainment dining concepts are set to grow in popularity over the next decade as the restaurant industry focuses on enhancing the guest experience. These concepts have evolved significantly in recent years, taking immersive dining one step further to create truly transformative food experiences.

The modernist Danish chef Rasmus Munk, for instance, has developed a new experience that brings theatre, art and chemistry into the dining area. On arrival, guests will enter the Alchemist restaurant's experience room, where programmable LED panels will create a shifting panorama of cityscapes and video artworks. Later, they will be seated under a planetarium-style ceiling in the main dining room.

In November 2019, meanwhile, a new immersive art and dining experience will be launched on board *MSC Grandiosa*. Inspired by the works of Edgar Degas, Degas Danse Dessin will bring guests closer to the art through mesmerising video interpretations of the artist's famous ballerina paintings.

Guests will dine in the French L'Atelier Bistrot Lounge to take in the tastes of Paris alongside the original Degas sketches and etchings.

'Dining experiences must now stimulate all the five senses,' says MSC Cruises' Mr Vago. 'It's not just about the food any more. It's about what you see, hear and feel. That's how you create a transformative dining experience.' With 70% of consumers preferring to visit eatertainment formats over typical casual dining restaurants when eating in a group, such concepts represent the convivial future of the guest experience (source: Technomic).

By 2030, immersive technologies like VR will have become a cornerstone of these concepts, transporting guests to new worlds where they can eat, drink and socialise. The MSC Cruises World Class ships, for example, will feature 4D dining for an immersive dining experience that encompasses all five senses, while Otherworld, one of London's first VR bars, is also demonstrating what this future will look like. Bringing the future of entertainment together with pan-Pacific food and self-service beer, Otherworld has 14 immersion rooms where adventurers can put on a headset and be truly lost in one of the 16 VR experiences and games.

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Pierfrancesco Vago, Executive Chairman of MSC Cruises



Chapter 3: UHD Purpose

By 2030, the human impact on the environment will have become increasingly visible, with just 57 countries now on track to meet their 2030 climate change commitments made under the UN's Paris Agreement (source: UN).

This is creating a desire for a more efficient and eco-conscious approach to consumerism, as sustainability, social impact and civic engagement increasingly sit at the forefront of people's minds. More than half of Generation Z consumers (54%) say that the environmental impact of travelling on destinations is an important factor when deciding where to travel, while 56% would want to stay in eco-friendly accommodation (source: Booking.com).

'The world is precarious politically and environmentally,' says Leite. 'As a result, people are looking for a way to counter their concerns over any negative impact on the world. They want to do things sustainably and in the right way. Brands must appeal to these feelings, help make things better and engage people on these issues.'

With this in mind, the guest experience of 2030 will place a significant focus on sustainability, social impact and civic engagement, enabling guests to assuage any feelings of guilt and use their experiences to positively affect the environment, engage with local communities and enrich themselves. UHD Purpose explores how this desire for purposeful engagement will be manifest in different sectors over the next decade.

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Naomi Leite, Lecturer in Social Anthropology at SOAS, University of London

01. Civic Enrichment

To appeal to increasingly progressive guests, entertainment in 2030 will feature concepts that encourage learning, personal development and giving back to local communities.

A natural extension of volunteer tourism, something that 84% of Millennials said that they would travel abroad to participate in according to Marriott Rewards Credit Card, Civic Enrichment will help eliminate any guilt that guests, more aware of their privilege and impact on the world, may feel when travelling. 'When going on holiday, more people are looking for enrichment, from the lectures we offer to the on-shore experiences that enable guests to engage with local communities,' says Mr Onorato.

For University of London's Naomi Leite, engaging in this kind of behaviour will be of growing importance to future guests, who, in their fast-paced everyday lives, will find themselves with scant opportunity to do so. 'People don't connect in their own communities because they don't have time,' she says. 'Many people, who are totally uninterested in volunteering in their own community, will take a volunteer trip abroad because you can do things that you don't do in your ordinary life when you're able to press pause.' A number of brands are leading the way and providing guests with Civic Enrichment options. A new

travel agency that uses tourism to support human rights recently launched its maiden tour to Colombia. Justice Travel invites local activists, community leaders and journalists on its tours to encourage travellers to learn and return, and contributes 30% of its profits to human rights partners.

MSC Cruises, meanwhile, is developing a set of shore excursions designed to educate and engage guests with environmental initiatives ashore. From saving baby sea turtles in the Caribbean and meeting urban honeybees in Copenhagen to helping keep Croatia's beautiful bays and beaches clean, guests will be able to create memorable experiences in close contact with nature in different environments around the world.

By 2030, the desire for personal enrichment may be the sole reason for a number of guests' decisions to visit a destination or stay in a particular place. Bring it Back, a collection of mission-driven itineraries that travellers can customise based on personal goals and challenges, is working towards this future. Its offer consists of trip ideas built around profound cultural experiences. Unlike with traditional holidays, guests will book them based on what they want to learn not where they want to go.

02. Repurposed Resorts

In 2030, hospitality brands will transform uninhabited or once-derelict spaces, boosting local economies by turning them into unique destinations.

By 2030, it is expected that nearly 5bn (61%) of the world's 8.1bn people will live in cities, according to UNESCO. And this will be a truly global phenomenon, with Latin America and the Caribbean set to have a greater percentage of inhabitants living in cities than Europe.

The economic impact of this movement into cities on rural areas will create opportunities for redevelopment as tourist destinations. MSC Cruises' Ocean Cay is a good example, illustrating how once-derelict areas can be given new life. The brand is restoring the island in The Bahamas that was previously used as a platform for barges to dredge sand, creating a new Bahamian paradise for guests that will also have a positive impact on the lives of locals.

The island will employ 140 local staff and work with local artisans and suppliers, giving back to the local economy. Some 64 square miles of waters around the island will be protected as a marine reserve, a coral nursery is being established to encourage and sustain the growth of new coral, while plans are also under way for a marine laboratory. With any historic or sensitive space, hospitality brands must consider the impact of regeneration on the local culture and natural landscape, building eco-conscious and community criteria into their plans in similar ways.

'We're transforming an area that has been harvested, dug and destroyed for the past 40 years into an environmentally sound marine destination,' says MSC Cruises' Mr Vago. 'We put together a group of scientists from all over the world to help us understand the potential of the island. It's not only about the restoration of the marine eco-system, but also to help us build greater resilience, to find and study ways in which the coral and other sensitive natural systems cannot just be preserved but also thrive – and that's what we are working towards.'

As modern living, jobs and education entice young people and families into cities, whole towns will also experience similar boosts, with hoteliers across Europe refashioning spaces that have been left behind.

In Italy, village resorts have become so popular that they have their own name – alberghi diffusi – or scattered hotels. Architecture studio noa*, for example, has resurrected an alpine village in an act of responsible tourism, turning an abandoned 19th-century barn and a vacant church into the luxurious Zallinger resort.

The Swiss village of Corippo, meanwhile, now home to just 12 inhabitants, will be transformed into luxury hotels, with once-abandoned cottages turned into rooms and a 'lobby' in the main square. It has been devised to spread tourist concentrations and reduce over-tourism in certain areas, enabling visitors to give back to local communities and keep profits in the country.

03. Cross-cultural Cuisine

In 2030, restaurateurs will use the cross-cultural nature of food to foster empathy and civic action.

‘There is a growing expectation among guests that they should be able to choose from any type of cuisine whenever they want,’ says LASED’s Kameron Durham. ‘This expectation is leading to the provision of increasingly multicultural and diverse dining options that are highly experiential.’

For many guests, food represents an accessible way to experience new cultures. By 2030, multicultural cuisine options will not only exist to satisfy appetites, but will also be used to help guests understand complex global issues, such as immigration and integration, through new cultural lenses.

Conflict Kitchen is a good example. A leader in guiding geopolitical discussions through cuisine, the Pittsburgh-based project comprises a rotating series of takeaway restaurants that serve food from countries in conflict with the US. Past iterations of the project, designed to spark debate about America’s relationship with other countries, have included an Iranian, Venezuelan and

North Korean restaurant. Co-founders Jon Rubin and Dawn Weleski have received an Andy Warhol Foundation for the Visual Arts Curatorial Fellowship to explore the potential of the project across a selection of US cities.

Philadelphia’s Reading Terminal Food Market’s Breaking Bread, Breaking Barriers programme, meanwhile, features a series of block party-style dinners designed to foster a cross-cultural dialogue between people of different faiths and ethnicities. In a similar vein, the international Cook for Syria initiative uses the medium of cooking to celebrate Syrian culture and cuisine, while highlighting the humanitarian crisis in the country.

In an uncertain world in which the profoundly political nature of food is being brought to the fore, this kind of guest experience can have a transformative effect both on individuals’ own cultural knowledge and understanding, and on how they think about dining itself. ‘Every single thing we eat and the way we share it has political implications, from who grew the ingredients to how they were distributed. This gives us so much power as individuals to effect change,’ says Julia Turshen, author of cookbook Feed the Resistance.

‘There is a growing expectation among guests that they should be able to choose from any type of cuisine whenever they want, this expectation is leading to the provision of increasingly multicultural and diverse dining options that are highly experiential’

Kameron Durham, Vice President of Guest Experience for the Los Angeles Stadium and Entertainment District at Hollywood Park (LASED)

Shifting mindsets will see brands take a holistic approach to wellness, considering the social and environmental impact of their offerings beyond the individual consumer.

Once spearheaded by health-conscious older generations, wellness tourism has changed momentum and is now being driven by environmentally conscientious Millennials and Generation Z. Spa retreats, long deemed the archetype of wellness tourism, are evolving beyond the traditional sauna and steam room to offer a more whole-system approach that includes nutrition, fitness and high-tech beauty in response: the Spa 2.0.

One retreat already tapping into this change in consumer behaviour is the Amatara Wellness Resort in Phuket, which has joined forces with Bangkok Hospital Phuket to offer a luxury Brain Health Enhancement package. Building on the idea that spas help to improve emotional wellbeing, the programme is designed to improve cognition and protect against age-related cognitive decline.

As well as empowering individuals, the Spa 2.0 will exist to have a positive impact

on local environments. The Maldives is one region that is pioneering this type of eco-spa. Alongside the Four Seasons resort at Kuda Huraa's more traditional roster of yoga, meditation and luxury spa treatments, it offers a Caring Conservation experience, which enables guests to take part in activities like looking after baby turtle hatchlings or transplanting coral frames as part of reef regeneration.

'It's one thing for a resort to promote and run a spa that draws from the purest organic marine elements, or activities that rely on a pristine marine environment, but if that same resort isn't taking solid steps to preserve that environment then it isn't operating as honestly or as ethically as it can,' says the Four Seasons Asia-Pacific spa director Luisa Anderson.

On MSC Cruises' private island in The Bahamas, Ocean Cay, the spa has been designed around this kind of sustainability-focused concept. All beauty products are eco-friendly and will have zero impact on the environment. In addition, the cruise line will raise awareness of the importance of using sun screen that does not harm the coral.

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‘The cruise industry now appeals to a whole range of demographics, and a focus on personalisation enables us to meet the needs of all guests, from families and newlyweds to Millennials’

Pierfrancesco Vago, Executive Chairman of MSC Cruises

Part Three: Conclusion

By 2030, the demands and expectations of a growing, increasingly diverse number of guests will have transformed the guest experience into something ultra-high definition (UHD). The cruising industry will sit at the forefront of this transformation, embracing creative and future-facing innovations that push the guest experience beyond the realms of what is now normal, or even possible.

‘Globalisation is seeing the world become smaller,’ says HVMG’s Matthew Woodruff. ‘More and more people have the ability to travel across the world like never before.’ While this will offer opportunities to grow customer bases and engage with new consumers, it will also provide a series of challenges, as brands seek to deliver a guest experience that can delight, inspire and excite.

With the next decade set to be defined by consumers’ pursuit of personalisation, desire for conviviality and demand for purpose-driven experience, brands that deliver on these three fronts can create a guest experience that is truly ultra-high definition.

The cruising industry is well placed to unite these three forces. UHD Personalisation is a case in point. ‘The cruise industry now appeals to a whole range of demographics, and a focus on personalisation enables us to meet the needs of all guests, from families and newlyweds to Millennials,’ says MSC Cruises’ Mr Vago, illustrating how a tailored experience can meet the needs of many.

The social nature of cruising, meanwhile, lends itself to UHD Conviviality, arguably unlike any other industry. ‘It’s such an exciting format, where curious guests seeking discovery can meet and connect with people from different cultures,’ says MSC Cruises’ Mr Onorato. ‘It’s a perfect antidote to reliance on technology and social media, and one that enables personal enrichment.’

Finally, with strong links to nature and an in-built cross-cultural focus, the opportunities for the industry to explore UHD Purpose are significant. ‘We’re inherently linked to the sea, and from this perspective there exists a big opportunity to play a big role when it comes to giving something back to the environment and to the planet as a whole,’ says MSC Cruises’ Mr Vago.

Those that harness these three shifts, creating future-facing innovations and concepts based around them, will lead us into this new era and transform the guest experience from something standard definition to something UHD – from which, once experienced, there will be no going back.

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