

# Hilton

The 2023 Traveler: Emerging Trends that  
are Innovating the Travel Experience,  
A Report from Hilton



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## **CEO Foreword: Setting the Stage for 2023**

2022 will go down in history as the year when travel came roaring back – and changed before our eyes. Travelers appeared earlier and in larger numbers than anyone predicted. We learned how to travel with pets. We packed our bags in search of relaxation and rejuvenation. We attended previously postponed weddings and concerts. We planned corporate retreats for entirely new teams. We cashed in our loyalty points for the long-awaited vacation of our dreams. In 2022, we walked away from our screens and were reminded of the unmistakable power of in-person connections.

2022 also uncovered unexpected friction points. After years of slowing down, life accelerated for many – full speed ahead – without a clear roadmap, creating a tension between the new and the old. Many employers and employees returned to offices while still joining virtual meetings. Travel demand outpaced travel recovery.

For those hitting the road, travel was familiar and unfamiliar at the same time. Both leisure and business travel faced speed bumps, resulting in some challenges, skepticism and less-than-ideal experiences. Despite these realities, travelers continued to explore destinations, both new and previous favorites – and put their faith in our industry. In 2022, we realized how much it matters where you stay.

This year, again, proved that travel is an unstoppable force. Travelers illustrated – month-over-month and week-over-week – their strong desire to see and connect with the world.

The following Hilton Trends Report spotlights the expected profile of the 2023 traveler while also showcasing how this year's tension points helped evolve travel preferences. Throughout, you will get a sneak peek into the creative and innovative solutions that will underpin our team members' efforts to deliver exceptional stay experiences in 2023 and beyond.

We are stepping into next year optimistically; ready for the adventures in front of us. Beyond 2023, our dedication to fill the world with the light and warmth of hospitality will always guide our efforts. Hospitality will always be the heart of Hilton.

Until we welcome you again – safe travels!

*Chris Nassetta*

President and Chief Executive Officer



## In Summary: The Profile of the 2023 Traveler

Following both qualitative and quantitative research, four consistent themes emerged that articulate the desires, preferences and passions of the 2023 traveler.

- 1. People will turn to travel for deeper, more engaging, human experiences and connections.** Travel is a gateway to discovering different cultures and perspectives and, in 2023, people will focus on travel as a way to create deeper connections with friends, family, colleagues, customers, cultures and the earth. There will be a rising interest in unique and engaging experiences, design and food & beverage programs, especially ones that connect the traveler to the local communities.
- 2. People will recognize authentic travel as an essential part of their wellness routine.** As the world emerged from the pandemic, people reconsidered what “wellness” meant in their lives – considering areas of mindfulness, emotional well-being and sleep, in addition to nutrition and fitness. In 2023, travelers will further prioritize travel with wellness in mind, looking for accommodations, destinations and authentic travel experiences that address their holistic wellness needs.
- 3. Travelers will want to be taken care of more than ever.** Next year, there will be a renewed appreciation for the most basic tenet of hospitality: to feel cared for. Travelers will be loyal to those brands and partners that fill this emotional and physical need and welcome moments of personalization or recognition for their loyalty.
- 4. Travelers want frictionless travel innovations that are both technology- and human-led.** While technology often powers the day-to-day, *people* provide relatability and personalization. To reduce travel’s strongest tension points, travelers will utilize new technologies, like enhanced online booking options and app-based solutions to make travel easier but continue to want excellent customer service through personalized guest engagements, tailored corporate contracts and unique event activations.

### **People will turn to travel for deeper, more engaging, human experiences and connections.**

Hilton recently commissioned a global survey to better understand the evolving passions and preferences of travelers. According to the study, 84% of global consumers hope to travel just as much – or more – in 2023.<sup>1</sup>

During their travels, survey respondents expect to gravitate toward even more engaging and diverse experiences and events. In fact, nearly half (49%) of survey respondents are looking to be immersed in local cultures and products while traveling in 2023.<sup>1</sup>

“Today’s hotel experience has evolved to reflect and complement its surrounding destination – from the design style and dining offerings to in-room amenities and on-property experiences – allowing guests to better connect with the local cultures and communities in which they are visiting,” said **Matt Schuyler, Chief Brand Officer, Hilton**. “With 18 distinct, award-winning

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brands, we have a hotel for every type of traveler – and that portfolio continues to expand globally.”

### ***Connecting through Culinary Experiences***

Throughout Hilton’s global portfolio, destination-focused culinary travel packages are expected to be on the rise next year. Recently, unique package offerings, such as celebrity chef culinary weekends, have become popular in destinations like Los Cabos, Mexico and Almancil, Portugal. [Waldorf Astoria Los Cabos Pedregal](#) hosted five culinary weekends in 2022, partnering with top-tier celebrity chefs including “Sustainable Chef” Kim Alter, renowned Mexican chef Claudette Zepeda, award winning chefs: Michael Mina, Nancy Silverton, Nancy Oakes, and barbecue legend Ronnie Killen. Each weekend sold out within days and required minimal marketing efforts to drive awareness. [Conrad Algarve](#) in Portugal has seen similar success with its recent 10-star Michelin Chef event in October, where all seven of the region’s Michelin Chefs came together in celebration of International Chef Day.

Immersive culinary journeys start at the source at [Conrad Koh Samui](#) in Thailand, where families can pick up eco-friendly farming techniques and learn about the farm-to-table movement at the resort’s Iris Farm, which grows organic produce for the resort’s bars and restaurants.

### ***Packaging Up Personal Passions and Celebrations***

Beyond food, travelers will pack their passions next year, looking to identify exceptional experiences that complement their personal interests. In fact, in 2023, 2 in 5 (40%) travelers will be looking for more immersive, personalized access to unique experiences and activities, such as performances, events, classes or spa treatments.<sup>1</sup>

For instance, the recent [reinvigoration](#) of [Hilton Honors Experiences](#) with new exclusive artist and celebrity events enables Hilton Honors members to redeem their Points for once-in-a-lifetime, members-only events and experiences, beyond room nights. In 2022, the McLaren VIP experiences in Singapore, Miami and the UK were the top-performing offerings, with just under 26 million Hilton Honors Points redeemed across the three events. Hilton Honors Experiences also open the door to immersive experiences, such as making fresh Chinese noodles and a variety of delicious dim sum at [Conrad Maldives Rangali Island](#), or baking a mouth-watering Royal Praline Cake and soft-centered Melting Moment cookies as part of a ‘Master Class’ led by [Hilton Kuala Lumpur](#)’s renowned pastry chefs. The platform saw a 77% increase in Hilton Honors Point redemptions from January to September 2022 compared to the same time period in 2021. With experiences expected to be at the forefront of travel decisions, this engagement is anticipated to strengthen next year.

“As we move further into our new normal, one thing is clear – people are shifting their spending to focus on experiences, like the ones we offer at our hotels and resorts,” said **Danny Hughes, Executive Vice president & President, Americas, Hilton**. “From belated gatherings to family reunions to 40<sup>th</sup> birthdays celebrated during the 42<sup>nd</sup> year, we are seeing a trend of traditional milestones celebrated at untraditional times to make up for the experiences and connections lost during the pandemic.”

As more travelers engage in unique, once-in-a-lifetime moments, experiences and celebrations, there will also be a heightened desire to preserve those experiences. Photo-forward hotel

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programming efforts, like the [Waitographer](#) program in the UK and the UAE, are anticipated to increase in popularity.

### ***Building Business Relationships and Making an Impact***

According to the recent Hilton global survey, the respondents who travel for work expect to do so more in 2023 and are looking to make or strengthen connections with co-workers or customers during those trips.

“Today, whether a transient business traveler or event planner, people are taking a close look at their schedules, as well as their destinations, to maximize the time they have to build and strengthen relationships while traveling or attending events,” said **Gerilyn Horan, Vice President, Group Sales and Strategic Accounts, Hilton**. “While this was always an objective of corporate and group travel, it is now a top objective for many planners as companies work to improve their team’s culture or expand their customer base.”

As it relates to the destination, more groups are gravitating to all-inclusive resorts and sustainable locations for both group and incentive travel, a trend that is expected to continue into 2023, especially in the U.S. [New](#) resort offerings in appealing destinations, like [Hilton Tulum Riviera Maya All-inclusive Resort](#) allow groups to enjoy the property’s fresh design and elevated dining experiences while also maximizing their downtime to interact with other guests and attendees.

Regardless of the property type, event planners are focused on building agendas that help attendees strengthen relationships with each other, while also seeking out organizations and venues that help them achieve their company’s ESG goals. With that in mind, programs like [Meet with Purpose](#) are expected to rise in popularity next year. The program, introduced in 2015 and relaunched in 2022, was built to help customers create meaningful change in both the attendee experience and within the communities they visit and focuses on three areas: *Gather Sustainably*, *Nourish Attendees and Communities*, and *Impact the Destination*.

### **People will recognize authentic travel as an essential part of their wellness routine.**

With a growing interest in personal wellness, in 2023, people will further define what “wellness” means in their lives – considering areas of sleep, recovery, nutrition, and mindfulness. In fact, 50% of global Hilton survey respondents feel it’s important that their 2023 travels address their mental or physical wellness.<sup>1</sup> When planning their travel, those individuals will look for accommodations, destinations and authentic travel experiences that address their overall wellness needs.

“Wellness has long been important to our guests, and we know the pandemic accelerated customers’ expectations for brands to meet them where they are in their own personal wellness journeys,” said **Lara Hernandez, Senior Vice President, Global Brand Planning & Innovation, Hilton**. “This cultural shift now serves as an underlying catalyst for us to increase our focus on wellness at Hilton, from the partnerships we choose to the on-property experiences offered across our brands at hotels around the world. Hilton is in a unique position to lead and address overall well-being, as we continue to innovate to meet the changing consumer wellness needs.”

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### **Wellness for the Body**

On the road, most travelers are looking to recharge, recover or relax and nourish their bodies. Being able to address their physical well-being while traveling will be a priority for a third (33%) of global travelers in 2023, and for over a quarter (26%) of respondents accessibility to fitness amenities like centers or activities will be top of mind while traveling next year.<sup>1</sup>

Hilton remains committed to meeting the needs of these travelers, and just [recently announced](#) a new, industry first partnership with Peloton. By the end of the year, nearly all 5,400 hotels across Hilton's U.S. hotel portfolio of 18 award-winning brands will feature at least one Peloton Bike in every fitness center, providing guests with a more holistic wellness experience, including access to Peloton's world-class instructors and expansive connected fitness content.

Hilton's 18 distinct brands each provide a unique approach to wellness. For instance, Tempo by Hilton showcases how wellness can be seamlessly integrated into the hotel and guest experience. Wellness and innovation have been at the core of the brand's identity since it was introduced in 2020, curating approachable and thoughtful accommodations to help guests relax and recharge.

The first Tempo by Hilton hotel [will open](#) in Times Square in 2023. The new hotel will be designed with thoughtfully appointed rooms that offer comfort and functionality, plus an emphasis on well-being.

Waldorf Astoria Hotels & Resorts also recognizes the value of partnering with complementary brands to enhance the on-property wellness offerings. In 2022, to rejuvenate the in-room guest experience within the portfolio, the brand announced a partnership with [Aesop](#), known for formulating high-quality products for the skin, body and hair, as well as fragrances and accessories for self and space. In addition to offering select favored formulations in-room, the partnership also marks the conscious shift from travel-size toiletries for the Waldorf Astoria brand as part of Hilton's ongoing commitment to reduce its environmental impact.

Beyond improving fitness and amenity offerings, Hilton continues to evolve its food and beverage concepts to address guests' changing nutritional preferences and tastes. For instance, more than 2 in 5 (41%) travelers, globally, will be looking for healthier options to eat and drink as they travel next year; while 32% of travelers will prioritize locally sourced food and beverage products.<sup>1</sup>

"No matter where you are in the world, it is clear that today's modern traveler is searching for unique food and beverage experiences, and their interests stretch far beyond what is on the plate or in the glass, including a greater attention to their overall well-being," said **Adam Crocini, Senior Vice President and Global Head, Food & Beverage Brands, Hilton.**

"Knowing each guest is looking for high quality and differentiated experiences, our teams are developing concepts that address current trends and fill market needs to provide the most relevant F&B experience, meeting our guests where they are."

"In Asia Pacific, sharing a meal with family, friends and colleagues is integral to the social fabric of the community, enabling locals and international guests to make new connections and reconnect. Dining options within the hotel are amongst the top considerations for Asia-Pacific

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travelers when choosing where to stay,” said **Alexandra Jaritz, Senior Vice President, Brand Management, Asia Pacific, Hilton**. “We’re seeing diners consciously opt for food that is healthier, more sustainable and authentically local, and are continually ensuring our food and beverage offerings cater to these preferences across our portfolio of brands.”

In the Europe, Middle East and Africa region, an increasing number of diners are identifying as “reductarians” – those who reduce their meat consumption. Fueled by a renewed passion for eco-conscious consumerism and emphasis on health, the reductarian diet ultimately stems from pop culture and surged during the pandemic. Around the world, the global Hilton Food & Beverage teams are also seeing an increased number of vegetarians, people converting to 100% plant-based diets and others joining the sober curious movement, trading in alcoholic drinks for low-to-no ABV beverages.

“Food & Beverage is playing an increasingly large role in people’s travel plans, so people want access to incredible and authentic dining experiences, with a particular focus on ‘local’, including local strategies, like reducing airmiles and supporting local sustainability. Health continues to be at top of mind, and we are introducing more plant-based, sober-conscious options at our hotels,” said **Emma Banks, Vice President, F&B strategy and development, Europe, Middle East and Africa, Hilton**.

Even as wellness offerings expand beyond the traditional, when it comes to spa services, it’s not just a static massage menu anymore. Travelers are seeking impactful, transformative experiences, including results-driven spa treatments that leave them feeling or looking refreshed and rejuvenated. Hilton is seeing an increased demand for spiritually connected treatments, including connecting the traveler to nature and other ancient practices like the Temezcal Ceremony at [Hilton Playa del Carmen’s SPAzul](#), where ancient philosophies are combined with cutting edge wellness techniques as guests indulge in an ancient ritual cleanse with a traditional Mesoamerican stone steam bath. From aromatherapies to sound baths to salt stone massages, Hilton has spa offerings for every type of traveler, every stay.

## ***Wellness for the Mind***

As people pay more attention to their mental well-being, they will look for insights and solutions that improve their mental and emotional health. Being able to address and improve their mental wellness on the road will be prioritized by 35% of global survey respondents, and nearly half (49%) of employed global survey respondents will be looking to travel in 2023 to disconnect from work.<sup>1</sup>

With this in mind, there’s an anticipated shift toward purposeful, authentic travel experiences and away from social media-driven travel moments. For instance, at the newly-opened [Royal Palm Galapagos, Curio Collection by Hilton](#), travelers can book their unique [30-day “Live Life” sabbatical experience](#). This extraordinary package gives guests a chance to respectfully immerse themselves in nature while experiencing the uniqueness of the UNESCO World Heritage Galapagos. Visitors will discover how the island of Santa Cruz inspires exploration and rejuvenation with a wide variety of adventures, from hiking, snorkeling and kayaking to nighttime bird watching, encountering giant tortoises up close, touring lava tunnels and more.

Signia by Hilton properties address the premium wellness needs for sophisticated leisure, business or group travelers. For instance, guests at the [recently opened Signia by Hilton San](#)

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[Jose](#), can recharge in the expansive fitness center with upgraded Technogym equipment, steam room and sauna; relax and disconnect from work at the outdoor rooftop pool overlooking the mountains; or indulge in chef driven food and beverage outlets focused on a variety of global cuisines and California wellness.

## **Wellness for the Spirit**

Travelers want to connect with each other while also preserving the world around them. More than 1 in 3 (36%) travelers will be looking to learn about local cultures or give back to the community during their 2023 travels.<sup>1</sup>

“Our company was founded on the belief that our hospitality has the power to be a force for good,” said **Erica Gordon, Senior Vice President and Global Head, Public Affairs & ESG, Hilton**. “As the world returns to travel, doing so sustainably and responsibly has never been more important.”

More than ever, people will be looking at brands that are embracing their purpose and doing their part in local communities. As one of the world’s largest hospitality companies, Hilton drives responsible global tourism through its [Travel with Purpose ESG strategy](#) supporting the local communities in which it operates for generations of travelers to come.

In partnership with Hilton, hotel owners are helping to lead the charge in preserving the environment. At [Hotel Marcel New Haven, Tapestry Collection by Hilton](#), the first-anticipated net-zero hotel in the U.S., the on-site American restaurant and lounge BLDG (pronounced “building”) offers locally-sourced menu items served alongside biodynamic and organic wines. BLDG’s kitchen, as well as the hotel’s laundry room and heating systems, run on electricity instead of natural gas.

Innovative partners are also coming to the table with eco-friendly solutions that are both sustainable and flavorful. In the UAE, Hilton partnered with the world’s first climate-positive gin and vodka brand, [Nàdar](#), becoming the first hospitality brand in the UAE to launch the product. The spirit, which is made from peas, avoids more carbon emissions than it produces. Nàdar products and crafted cocktails are available at select hotels within the UAE portfolio, including [Waldorf Astoria Dubai International Financial Centre](#) and [Waldorf Astoria Ras Al Khaimah](#) whose mixologists developed the bespoke cocktail menu.

## **Travelers will want to be taken care of more than ever.**

Today, there is a renewed appreciation for the most basic tenet of hospitality: to feel cared for. In looking forward, people will be more loyal to those brands and partners that fill that emotional and physical need. Both business and leisure travelers will also welcome moments of recognition for their loyalty.

According to a new Hilton survey conducted by Wakefield Research and as spotlighted in Hilton’s latest brand platform, “[Hilton. For the Stay](#),” travelers feel strongly about being cared for during any given trip. So strongly, in fact, that 93% agree that a hotel stay experience can make or break a trip. In addition, 84% who have had a less-than-ideal rental or homeshare experience agreed they are more likely to stay in a hotel for their next trip.

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“At Hilton, true hospitality, caring for guests from check-in to check-out, is at the heart of everything we do,” said **Matt Schuyler, Chief Brand Officer, Hilton**. “Whether at a newly introduced Tempo by Hilton property or discovering the Home2 Suites brand in Asia Pacific, we understand the importance of delivering reliable and friendly service to every guest, every stay.”

“In Asia Pacific, the pent-up desire to reconnect with loved ones as travel takes on a deeper meaning is resulting in today’s leisure traveler emphasizing quality time with family,” said **Ben George, Senior Vice President and Commercial Director, Asia Pacific, Hilton**. “Exceptional hospitality and innovative guest experiences that anticipate this need go a long way in giving families the peace of mind knowing that they will be taken care of on every level, including helping them to create more shared moments and memories together.”

## ***Recognizing Loyalty when It Matters Most***

Hilton Honors members know the importance of wanting to feel valued for their loyalty. In fact, 42% of survey respondents indicate that loyalty perks – such as earning/redeeming points and loyalty benefits – will matter to them when traveling in 2023.

After Hilton Honors rolled out [automated upgrades](#) to Luxury, Lifestyle and Full Service brands, the program awarded more than one million auto-upgrades to Gold and Diamond members systemwide between November 2021 – September 2022. Knowing upgrades are one of the top valued benefits of elite Hilton Honors members – and that 1 in 4 (25%) survey respondents said upgraded reservations or experiences will be important to them in 2023 – these numbers are only expected to increase next year.<sup>1</sup>

As road warriors return to traveling, Hilton Honors elite members, as well as travelers with small-to medium-sized businesses, will be brushing up on their travel expertise and further engaging with loyalty programs to maximize rewards earned. Increased engagement is expected with member-only opportunities like quarterly promotions, co-branded [American Express](#) credit card offers and more.

“As many business travel road warriors fall back in love with travel in 2023, we know we need to do our part to care for and address the needs of our guests and valued Hilton Honors members,” said **Jennifer Chick, Senior Vice President and Global Head, Hilton Honors and Customer Engagement, Hilton**. “Right now, we are feeling friction between the pull of wanting the travel experiences of the past and the push toward innovations of the future – and that’s going to drive change, in exciting ways.”

## ***Designing a Stay that Matters***

Part of “elevating the stay” means designing a guest environment that flexes to our guests’ differing needs. As the purpose of their trip increasingly blends elements of business and leisure – so should the design and atmosphere of hotels. Next year, guests will seek out hotels that have flexible hybrid spaces that shift to their evolving needs.

“Today, guests are looking for hotels that are thoughtfully designed,” said **Larry Traxler, Senior Vice President, Global Design, Hilton**. “When traveling, they want to be in spaces that are fresh, flexible and reflective of the local culture – but that are also highly functional and ergonomically thoughtful. Their needs and desires might flex from day to night or from weekday to weekend, depending on the reason for the stay.”

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Various design elements at properties across the globe are implemented with the goal of “elevating the stay” and, most recently, Hilton has taken its innovation in this area to new heights. Hilton was named the [official hotel partner of Starlab](#), the planned free-flying commercial space station in development by space exploration company Voyager Space. By helping to design and develop Space Hospitality crew headquarters aboard Starlab, including communal areas, hospitality suites and sleeping arrangements for the astronauts, Hilton is helping reimagine the human experience in a whole new destination: space.

Personalized and flexible design can also evolve beyond the accommodations and stretch into other elements of the stay that matter most to guests. Each year, 30 million DoubleTree chocolate chip cookies are consumed across the brand’s 640+ hotels around the world – with travelers booking hotel after hotel to enjoy that warm welcome. In 2023, for the first-time ever, a guest-designed “doodle” will appear on the sleeve of the famous DoubleTree cookie. Travelers were encouraged to create a custom doodled sleeve that expressed exactly what the DoubleTree cookie warm welcome meant to them. The winning design will be celebrated and used to welcome guests at more than 350 DoubleTree by Hilton hotels in the U.S. for a limited time beginning January 2023.

2022 spotlighted the pet friendly travel trend that saturated the world, seemingly overnight. This year, responding to this demand, [Hilton and Mars Petcare expanded their partnership](#) in the U.S. across Hilton’s seven pet friendly brands – Canopy by Hilton, Embassy Suites by Hilton, Hilton Garden Inn, Hampton by Hilton, Tru by Hilton, Homewood Suites by Hilton and Home2 Suites by Hilton.

Going into 2023, the “pet friendly” booking filter is expected to hold steady as the No.3 most engaged booking search filter on Hilton.com, and it’s no wonder – travelers are looking for every opportunity to bring their pet companions on the road with them, and the booking data agrees. Between Q1 and Q3 2022, Hilton saw double-digit growth in bookings from travelers using the “pet friendly” filter or pet landing pages on Hilton.com.

### **Travelers want frictionless travel innovations that are both technology- and human-led.**

Travel, by its very nature, can be challenging. To reduce travel’s strongest tension points, travelers will seek out the most logical and purposeful solutions – from digital technologies, enhanced booking options and ESG (Environmental, Social and Governance) reporting tools to personalized guest engagements, tailored corporate contracts and unique event activations.

According to a recent global Hilton survey, more than half of respondents (56%) confirmed they are most concerned about having an easier travel experience in 2023, with more parents (58%) feeling this way than non-parents (54%).<sup>1</sup>

“Despite our increasingly digital world, travelers are still looking for human connections, experiences and solutions that make them feel truly cared for,” **said Chris Silcock, Executive Vice President and Chief Commercial Officer, Hilton.** “People are searching for the most convenient, but also the most logical solutions to their problems – they want to adopt digital

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efficiencies to expedite transactional activities but also crave personalized interactions for situations that call for a human perspective and action.”

Nearly 9 in 10 (86%) survey respondents will be looking for personalization during their travel experiences and interactions – which could mean a daily greeting, reservation recommendation, in-room technology tailored to personal viewing apps or room upgrade based on booking preferences.<sup>1</sup> Travelers understand that, while technology often powers the day-to-day, *people* often provide relatability, personalization and genuine hospitality that cannot be digitally replicated. This may be why more than half (53%) of survey respondents say they’ll care about reliable and friendly service when traveling in next year.<sup>1</sup>

“The essence of hospitality is about human connections, and that’s where our strong workplace culture empowers our team members to truly shine and deliver exceptional guest experiences,” **said Laura Fuentes, Executive Vice President and Chief Human Resources Officer, Hilton.** “By working in an inclusive and healthy environment where they feel cared for and part of something bigger than themselves, we know they will welcome our guests with that same commitment to hospitality and reliable, friendly service.”

### ***Finding Efficiencies, One Click at a Time***

Solutions that streamline the travel experience are driving booking activity, a correlation expected to grow even stronger in 2023. On Hilton.com, Electric Vehicle (EV) chargers was one of the top booking filters that led to confirmed stays, along with Digital Key.

In early 2022, Hilton introduced an EV charger search function on Hilton.com, recognizing the increased interest in EVs as well as the corresponding need for charging stations. The filter makes it easier than ever for guests around the world to find properties with EV charging options. Today, EV chargers are available at more than 1,500 hotel locations worldwide and growing.

Additionally, [Confirmed Connecting Rooms by Hilton](#), an industry-first and long-needed solution (especially for families) saw an impressive number of reservations in 2022, with travelers booking 1.5 million room nights between its launch in 2021 and September 2022.<sup>3</sup> Given the positive response during its first year, we anticipate travelers will continue to engage with this booking option in the coming year.

Once on-property, more and more guests are utilizing the Hilton Honors Digital Key, allowing users to bypass the front desk and go straight to their room. From January through June of 2022, more than 7.9 million digital keys were downloaded globally. This popular technology is available at more than 80% of Hilton’s more than 7,000 properties and growing. In addition to driving travel efficiencies, the innovation is also contributing to ESG efforts, with more than 125 tons of waste from plastic keys diverted from the landfills since its launch in 2015.

### ***Fusing Physical Solutions with Digital Advancements for the Dining Experience***

In 2023, guests will expect a balance of both digital and human innovations within the hotel dining experience. Diners will be looking for elevated menu offerings, creative solutions to dietary restrictions/preferences and more efficient operations.

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“At Hilton, it is our responsibility to deliver a guest experience that is equal or better than what they could find outside the doors of our hotels’ restaurants and bars,” said **Tom Walters, Senior Vice President, Food & Beverage, Americas, Hilton**. “That means anticipating the trends and solutions before people ask, and integrating technologies that enhance the guest experience where and when it makes sense.”

In addition to an anticipated increased usage of QR codes, contactless payments and ordering, third-party partners will be tested to drive efficiencies, reduce transactional interactions between guests and team members and increase personalized, in-person connections. That said, not all change and efficiency can be found in an app, especially when it comes to food.

With more travelers looking for healthful food and beverage offerings on the road, Homewood Suites by Hilton, which offers guestrooms outfitted with modern kitchenettes, responded to this need by rethinking their on-property market approach. In 2022, they debuted an elevated concept in their U.S. hotel portfolio. These new “Suite Shops” replaced many of the high calorie offerings, like soda, chips and cookies, with more nutrient-rich or wellness-minded options, like dried fruit, kombucha and organic frozen meals.

## ***Prioritizing Control and Convenience***

Next year, more travelers are expected to look for all-inclusive offerings, hotels with breakfast included and more drivable stays as a way to increase the control and convenience of their travels.

Having anticipated these changing preferences, Hilton has grown its all-inclusive room count in the Caribbean and Latin America by nearly 75% since 2021. And the ability to relax while staying at Hilton all-inclusive resorts is even easier with the expansion of technologies, such as durable smart-tech wristbands that make the guest stay more seamless. The wristbands, now deployed at properties such as [Hilton Cancun, an All-Inclusive Resort](#), serve as a digital room key and enable guests to authorize contactless payments outside of the all-inclusive offerings available on property.

Road trips continue to be top of mind for travelers. In 2023, more people are expected to travel by car for both leisure and business trips. Hilton brands like Hampton by Hilton and Tru by Hilton, which are conveniently located near many major highways and offer complimentary hot breakfast, are well positioned to deliver the convenience and comfort that guests will be seeking next year. In fact, in the U.S., travelers are never more than 30 minutes from the next Hampton hotel, on average.

And never underestimate complimentary breakfast. As the No.1 used search filter on [Hilton.com](#), free breakfast remains a priority for many travelers around the world, especially across the Embassy Suites by Hilton, Hampton by Hilton, Tru by Hilton, Homewood Suites by Hilton and Home2 Suites by Hilton brands. In the U.S., signature favorites will continue to draw travelers in, whether it’s the cooked-to-order omelets at Embassy Suites, delicious pancakes with the wave of a hand using Tru’s automatic pancake maker or fresh-baked waffles at Hampton properties.

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In addition to the demand for a complimentary offering, other emerging breakfast trends include a desire for lighter and healthier options, the rise in iced coffee beverages and increased popularity in alternative milks.

### **Answering Business Needs with “Hospitality First” Innovation**

Next year, companies and their travelers will seek to maximize business travel efficiencies as well as ROI – within areas like contracting, corporate travel booking and tracking systems, as well as reporting data and tools that enable customers to support their ESG goals and priorities.

“There is no right, one-size-fits-all approach to customer-centric innovation,” **said Frank Passanante, Senior Vice President and Global Head of Sales, Hilton Worldwide Sales.** “We know our customers are looking for more efficient ways of doing business and, as trusted partners and leaders in the industry, it is our job to listen loudly, understand their goals and evolve to meet their needs.”

As an example, Hilton understands customers have been looking for a simplified approach to researching and booking small events. Over the past two years, Hilton has created a more seamless experience on Events.Hilton.com, now offering more refined capabilities, including expanded search filters, account portals to track group bookings and customization for actions like bell-curve bookings (group booking that involves a different number of rooms each night of the stay).

Road warriors – as well as the companies they work for – are returning to travel, changed, with different priorities and considerations.

For instance, sustainable travel has become an increasingly important consideration for travel and event planners. According to a [recent co-branded Hilton and American Express Business Travel study](#), there is a strong demand for carbon neutral meetings and ESG reporting globally, but most survey respondents (86%) had little to no awareness of hotel-level sustainability programs.<sup>2</sup> In 2023, Hilton is strongly positioned to meet this need with the proprietary and award-winning tool, [LightStay](#). First introduced in 2009, LightStay tracks the environmental and social impact of each of our hotels and enables customers to receive impactful, data-rich reports.

Of those business travelers surveyed, nearly half (40%) expect to mix business and leisure trips.<sup>1</sup> This lines up with the activity the Hilton Business Travel team is seeing in the Americas with the length of stay for business transient travelers having increased in 2022, on average, by 1.5 days.<sup>3</sup>

In Asia Pacific, this corresponds with extended stays at hotels. Hilton’s booking data recorded an increase of up to two days in the average length of stay from 2019 to 2022 – with Singapore and Bangkok taking the lead at five and four days, respectively.<sup>3</sup>

“Around the world, travelers are taking longer mixed purpose trips, which is why, now more than ever, it’s important we find solutions that can help reduce any friction around the hotel stay,” **said John Rogers, Senior Vice President, Brand Management & Central Operations, Europe, Middle East and Africa, Hilton.** “As leaders in hospitality, guests will expect us to deliver on a reliable and friendly experience, from the way in which we set up our lobbies, with

1. Hilton 2022 Travel Trends Survey  
2. Hilton and American Express Business Travel Study  
3. Hilton booking data



access to wi-fi and power sources, to providing a warm welcome to all guests, including pets, across the portfolio.”

## **Methodology and Contact Information**

Both qualitative and quantitative methods were used to determine the emerging trends detailed in this report.

**Qualitative:** Hilton conducted stakeholder interviews across the organization to gain perspectives on what travel looks like today and determine what is top of mind going into 2023. Business Divisions included: Business Travel/Events, Food & Beverage, Wellness, Sustainability, Design, Digital Innovation, Workplace Culture.

**Quantitative:** Hilton commissioned an online omnibus survey with Material, fielded August 2022 among general population consumers 18+ years of age in several markets with questions targeting behavior related to travel. Specifically, the survey was fielded to: n=1,002 in Australia, n=1,002 in China, n=1,002 in Germany, n=1,002 in Japan, n=1,002 in Mexico, n=1,002 in the U.K. and n=1,018 in the U.S. Additionally, a Hilton Survey was conducted by Wakefield Research ([www.wakefieldresearch.com](http://www.wakefieldresearch.com)) among 1,000 U.S. Adult Travelers, between August 23rd and August 30th, 2022, using an email invitation and an online survey. This data has been weighted to ensure accurate representation of U.S. travelers. “Travelers” are defined as those who took a trip in the past 24 months that required an overnight stay.

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