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Living Trends:

The Year of Experience as Identity

With a push from novel technologies used in creative ways, and a pull towards authentic experiences that make us more human, the resulting tension redefines our customers and the ways in which we serve them.

Customer passion isn't a given and loyalty isn't transactional. They're tickets to something deeper: connection, immersion, a sense of place.

The Delta lounge isn't a space to wait; it's signal of belonging, with speakeasy bars and Michelin-inspired menus. McDonald's CosMc's isn't a drink; it's an aesthetic, a vibe, a post.

The new currency is less about rewards, and more about identity. The brands that last won't just serve; they'll see. They won't just sell; they'll shape the feeling that you were always meant to be here.

Here are the seismic shifts reshaping travel, hospitality and dining in 2025— bold, visceral, inevitable.
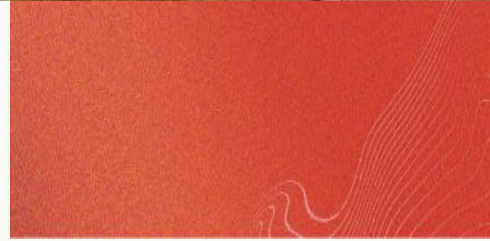
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About the report

Generated from rigorous research, refined with internal experts at Publicis Sapient, and scaled globally with the help of AI in analyzing global trend reports, this document uncovers critical consumer, technology, and social trends that are affecting companies now and over a 3-year time horizon.

Many of the trends described herein necessarily overlap with Publicis Sapient's market-leading work in strategy, product, experience, engineering, and data/AI (aka, our "SPEED" construct), while other trends explore relevant topics beyond what we do. In this way, we hope this report stands out not only for its insights, but for its integrity in helping our clients determine priorities in years to come. If you're curious about how to harness the future inherent in these trends, give us a call; we'd love to leverage our digital business transformation expertise on your behalf.

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Category 1

Vision

Consumers are tired of algorithmic **déjà vu.** They want recommendations that feel like they're discovering a hidden secret, something unexpected, yet delightful.

Algorithmic Alchemy

AI shouldn't just predict what you like—it should expand your world.

Consumers are tired of algorithmic déjà vu. They want recommendations that feel like they're discovering a hidden secret, something unexpected, yet delightful. Like a friend who knows you well enough to get you that perfect gift you never would have chosen for yourself.

So what? AI + the element of surprise = a refreshing new perspective. While there is comfort in predictability and familiarity, consumers are increasingly seeking out experiences that expand their perspective and perhaps even their comfort zones, and brands should help facilitate this widening aperture. Those with the best data, and the ability to connect data, capabilities, and consumer identity will be the ones who win.

Where it's happening:

Marriott

Marriott Homes & Villas → Finding the perfect vacation rental is easier and more natural with the conversational AI powering Marriott's vacation planner. Travelers describe their ideal experience in natural language and AI figures out the rest.

Unique experiences

Detour Destinations → Travelers are finding alternatives to major tourist hubs in the form of "detour destinations" (e.g., Girona, Spain, instead of Barcelona), which offer unique experiences off the beaten path with fewer crowds and a more local feel.

Mystery trips

AI-Curated Mystery Trips → Travelers opt for surprise vacations, where AI selects destinations, activities, and accommodations based on their preferences and past travel behavior.

63%

of consumers say they are likely to visit a Detour Destination on their next trip. (Source: Expedia)
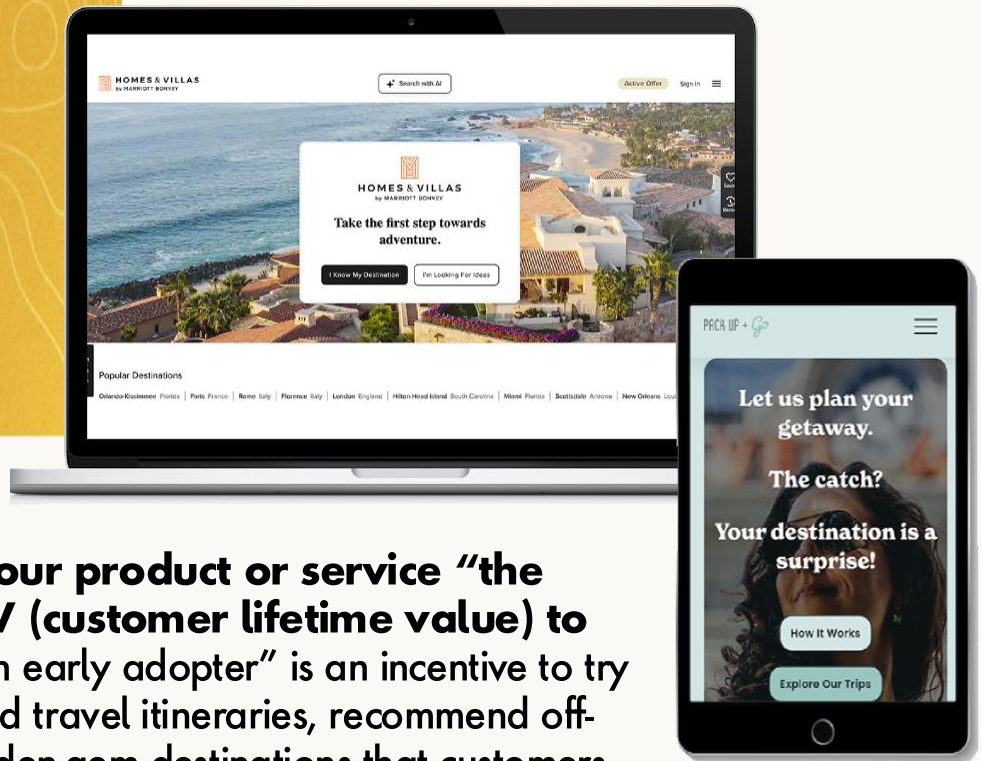
Consider: What data would make your product or service "the perfect gift"? How might we use CLV (customer lifetime value) to fine-tune our offerings? "Want to be an early adopter" is an incentive to try a new location. Use AI to curate unexpected travel itineraries, recommend off-menu dining experiences and introduce hidden-gem destinations that customers didn't know they needed. Predictability breeds indifference. The brands that win in 2025 will be those that **make the unexpected feel inevitable.**

Story Spaces

Consumers don't want just a space—they want stories.

No one wants to stay in a blank slate. Consumers care about what's behind the brand and how it got here. They want to know the provenance of their food, of the land on which their lodging sits, and how their favorite place came to be. It's not one-way, either: people want to create and share THEIR OWN STORY of how they've interacted with that brand, creating an even tighter symbiotic relationship.

So what? The places that matter (the ones people return to, talk about, carry with them) are the ones with a pulse, a past, a voice. For hotels, it's about more than the physical plant and its amenities: it's about how that property connects to the history, ecology, and culture of its location. For restaurants, it's not just about the food: it's about the health it engenders, the communities it's sustaining, and the cultural moments it's supporting. For newer brands, storylines aren't brought out by heritage, but rather by authentic connection to the lives of their customers, and the recognizable pain or joy their targets are seeking to address.

Where it's happening:

Hyper-local menus

Hyper-Local Menus → Restaurants like Noma pivoting to story-driven dining, where ingredients are an act of place-making.

Kona Village

Kona Village's Heritage Revival → Guests already valued the resort's luxurious but low-key vibe (see: Modern Nostalgia) and deep connection to its Hawaiian roots; repeat visitors often earned plaques in the dining room for families that came decade after decade. In this way, the hotel's story thus became their story, too. After Kona Village was devastated by a hurricane, guests couldn't wait to return and again be part of that story.

The Bear

The Bear Effect → Restaurants featured in FX's The Bear saw **foot traffic increase**, because meals taste better **when they mean something.**

Consider: What stories exist within your brand? How might we manifest them, in digital and physical touchpoints? Do you have a story, or just a "brand position"? Take care to develop your story and then support with appropriate technology. Use guest profiles to tailor experiences based on past behavior, implement geolocation tools to deliver hyper-local recommendations, and integrate augmented reality or interactive apps that let customers explore a destination's history and culture in real time.

Proliferating Partnerships

The best travel, hospitality, and dining experiences are expanding the boundaries of their offerings with surprising connections.

Your favorite hotel now includes a fitness membership, a co-working space, and an art residency. Your airline ticket comes with ride-sharing credits and dinner reservations. In 2025, experiences are ecosystems of partnerships without borders, creating expansive platforms for deepening engagement.

So what? Your customer wants more than a meal. Help them incorporate that meal or that lodging into other areas of their life they care about that provide delight, efficiency, or exploration.

Where it's happening:

Delta x Uber Eats

Delta x Uber Eats → Delta SkyMiles now unlock exclusive Uber Eats perks, letting travelers redeem miles for priority delivery, premium restaurant access, and in-airport dining upgrades.

Lego x Amtrak

LEGO x Amtrak → Amtrak introduces limited-edition LEGO train kits for passengers, turning long-haul journeys into interactive, buildable experiences that make travel feel like play.

Hilton x Shake Shack

Hilton x Shake Shack → Hilton's luxury lounges now offer Shake Shack's signature burgers, merging high-end hospitality with comfort-driven dining for premium guests.

Category 1: Vision

Consider: What new adjacent services could enhance day-to-day life and special moments? How do brands monetize partnerships effectively? Use AI to power cross-brand integrations, unify loyalty and payments, and create seamless travel, hospitality and dining experiences.

Points vs. Devotion

Loyalty is no longer a punch card—it's a belief system.

Punch cards gather dust. Rewards emails go unread. The points economy is a relic. Instead, you find your natural alignment: the coffee shop that remembers how you take your espresso, the airline that donates miles to causes you care about, the hotel that stocks your favorite books on the bedside table. No points. No expiration dates. Just the quiet certainty that you belong.

Where it's happening:

62%

Cruise Collectives → 62% of travelers are choosing theme-based cruises, up from 49% in 2023—loyal to the experience, not the brand.

Membership without geography

Dining as a Lifestyle → Soho House's "Cities Without Houses" program offers **membership without geography**, proving that people aren't loyal to spaces; they're loyal to feeling **seen**.

35%

Delta Concierge AI → Anticipates passenger needs before they arise, increasing engagement by 35%—because true loyalty isn't bought, it's earned.

DELTA CONCIERGE
Would you like to scan and verify your passport now?
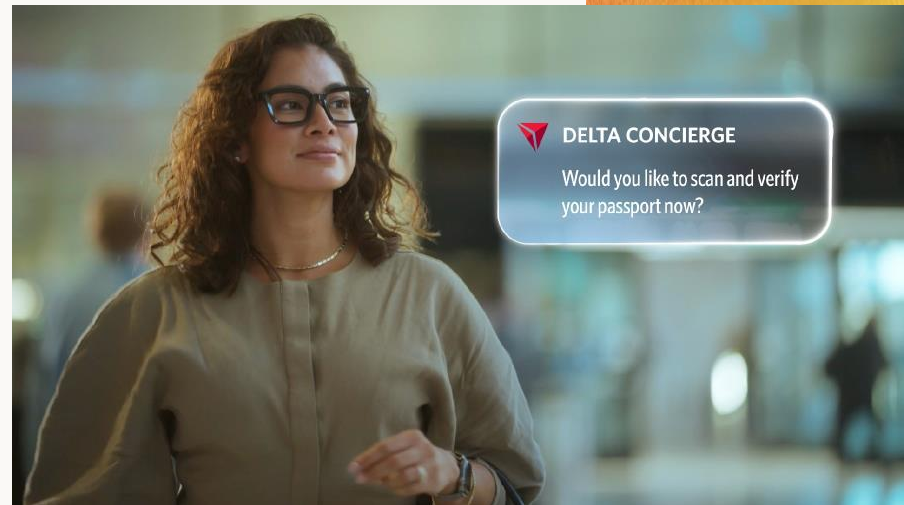
Consider: what are the true moments that matter in your customers' experience with you? Keep in mind that they may not be the loudest or shiniest moments, but they may not be costly, either. How might we make those moments reinforce a sense of belonging, and not just a cold transaction? A robust customer identity program should go beyond pure data and be able to recognize what drives customer intimacy and ultimately devotion.

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Category 2

Culture

Whether it's food, travel, or entertainment, consumers are seeking deeply satisfying experiences that nourish mind, body, and soul.

Mindful Indulgence

Sensory overload is out. **Mindful indulgence** is in.

People don't want more. They want to feel better. It's luxurious to be intentional. Whether it's food, travel or entertainment, consumers are seeking deeply satisfying experiences that nourish mind, body, and soul. With the rise of things like non-alcoholic alternatives and sleep-focused vacations, consumers are embracing healthy choices that present different socialization options.

So what? This shift demands that brands rethink indulgence. How do you make an experience feel decadent while still aligning with wellness trends? Restaurants and hotels alike must reframe luxury to stay ahead of changing behaviors.

Where it's happening:

Lounges

Wellness Airport Lounges → Lounges now feature oxygen bars, circadian lighting, and meditation rooms, driving an increase in premium food, wellness treatments, and relaxation spending. Delta Airline launched their "Well-Traveled" program with Tom Brady at CES in January, helping people engage in healthier travel.

Ozempic

The Ozempic Effect → The rise of GLP-1 medications such as Ozempic has led to a proven decrease in snacking, challenging QSR (quick-serve restaurants) revenues in that day part, and prompting airlines to offer smaller, high-protein meal options.

Third spaces

New Third Spaces → With a rise in alcohol alternatives, hotels and clubs are swapping cocktail hours for adaptogenic drinks, sunset yoga, and late-night wellness experiences.

Hilton data

In just the past year, 1 in 4 global travelers has either reduced or stopped their consumption of alcohol

Category 2: Culture

Consider: How might you develop wellness products and services, even if you're not a "health" company?
How can you build a global-but-local perspective on what plays well in a regional context?

Modern Nostalgia

The future isn't about looking back—it's about bringing the past forward.

Surrounded by screens in a world that moves ever-faster, consumers are longing for a connection to a time that seemed less artificial and digital. To get there, they are returning to old-school cool that's been updated with modern sensibilities.

So what? Hospitality, travel and dining brands can harness the desire for old-school value and vibe as long as it's done authentically. In doing so, even newer brands can foster deeper, more loyal connections.

Where it's happening:

Disney

Disney's Multi-Gen Travel Boom → According to Hilton research, 58% of global travelers who travel with their kids revisit destinations from their own childhood. Disney leans into this behavior by marketing multi-generational vacation packages.

Throwback authenticity

Throwback menus and vintage cocktails → Restaurants from New York to Singapore are reviving forgotten dishes from the 1960s and '70s—because authenticity tastes better when it's aged.

Volkswagen

Old soul, new heart → VW invested in revitalizing the defunct Scout SUV brand from International Harvester, a direct connection to one of the O.G. SUV's. But this time, the underpinnings are an all-electric platform supplied by Rivian.

TWA hotel

Rebooted travel icons → Beloved hotels and entertainment venues are being restored, not replaced. The resurrection of TWA Hotel at JFK Airport shows that travelers want a sense of time and place that connects past and present.

Consider: How can nostalgia be engaged authentically? What multi-sensory experiences could brands create to connect customers to this longing, while respecting the desire to simplify? Leverage data to bring back classic products, personalize throwback recommendations, and design immersive campaigns that blend past and present.

Value Wars

Consumers don't just want cheap. **They want worth it.**

With inflation fatigue at an all-time high, businesses are recognizing that consumers want a break. QSRs (quick-serve restaurants) have responded with ever-more-competitive value meals that drive traffic but also erode margins. Whether this is a temporary accommodation or a new normal for price expectations, travel and dining companies are navigating new territory in defining what constitutes value in today's economy.

So what? The battle isn't about low prices—it's about making every dollar feel maximized. QSRs will continue to demonstrate their contemporary relevance via family-friendly, affordable offerings that don't feel like bargain-basements, but they will need to maintain their brand relationships with more engaging loyalty programs.

Where it's happening:

McDonald's

QSRs Reinventing Value →
McDonald's CosMc's is using beverage customization and nostalgia to differentiate its new store concept and justify premium pricing.

All-Inclusive

All-Inclusive, Reimagined →
AI-driven pricing models adjust costs in real time based on individual spending behaviors.

Hilton

Hilton's "Vacation Maximizer" →
Guests bundle luxury stays with budget-friendly dining perks, boosting perceived value.

Consider: How might we use AI to help increase customer delight and revenues? How can we safely experiment with new value offerings without eroding our brand or customer perception? How can value still have an element of fun? Consumers will pay if it feels like a win. Implement dynamic pricing, bundle high-value offerings to increase spend, and design loyalty programs that prioritize personalized rewards over discounts.

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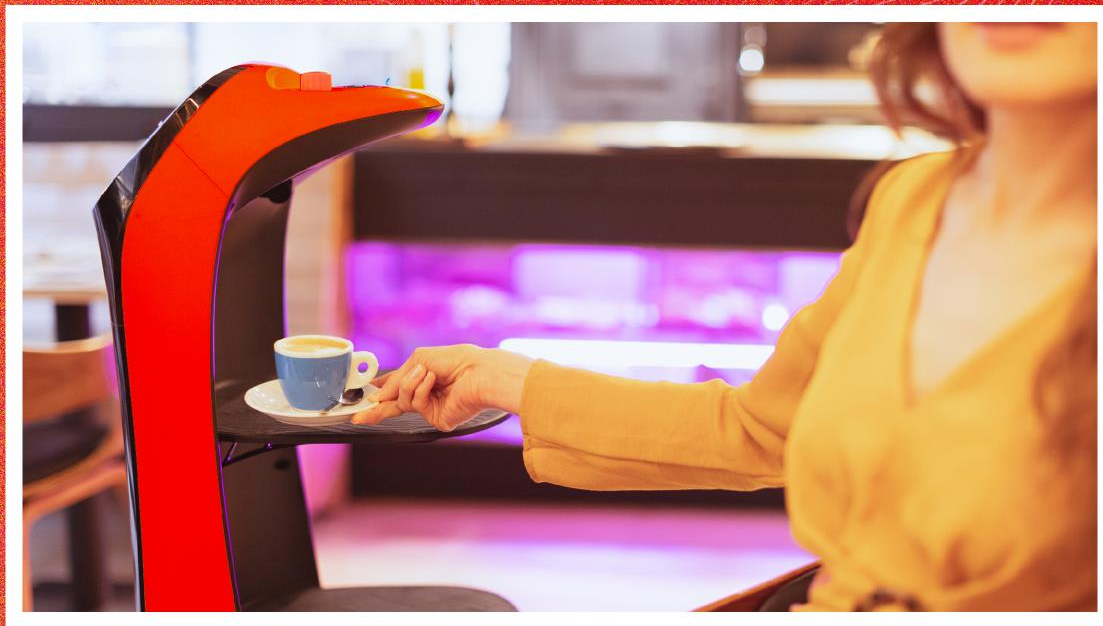
Category 3
Technology

Magic fades without the human hand. The art is in the balance: knowing when to let the AI machine hum in the background and when to let people make it real.

Pragmatic EverydAI

The past few years have been about AI hype. In 2025, AI matures, goes mainstream, and drives true business value.

AI is no longer the story—it's the infrastructure. Invisible, inevitable, and shaping the world without a whisper. Much like the internet, we'll soon take it for granted and expect it to hum in the background. In travel and hospitality, AI will accelerate and de-risk the innovation and customer experience (CX) design process, allowing for safe and scaled experimentation, while also increasing operational efficiency.

So what? The risk of this "everyday AI" is that in the desire for rapid progress, we forget to keep the human in the loop and launch shallow, low-value products because they were easy and safe to generate.

Where it's happening:

Dining

AI-Generated Fine Dining Menus →
Top-tier restaurants like Eleven Madison Park are testing AI-curated menus that adjust in real time based on sourcing, seasonality, and guest preferences.

Hospitality

Predictive Hospitality →
Hilton's AI models anticipate which guests will need a late checkout or a meal upgrade—before they ask.

Feedback loops

Instantaneous Customer Feedback Loops →
Hotels and restaurants are using AI sentiment analysis to fix guest dissatisfaction before the bill even arrives.

Dev cycles

AI-driven product development cycles →
Using synthetic research, synthetic products and synthetic testing to go-to-market faster.

"What is written without effort, is read without pleasure" - Samuel Johnson

Consider: Where might your organization need to accelerate? Could AI help? How might we retain the human element of product development, but integrate AI?
Consider an hour-glass product development approach with lots of input to generate ideas, but also lots of testing on the back end to make sure they measure up.
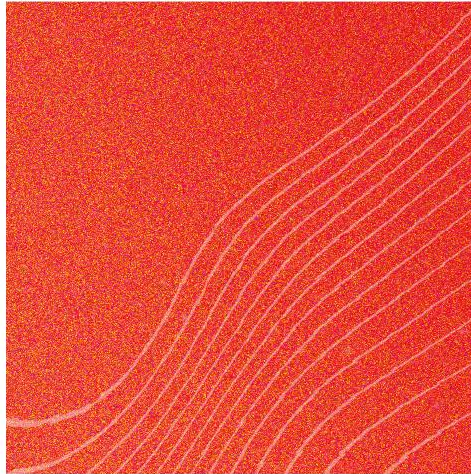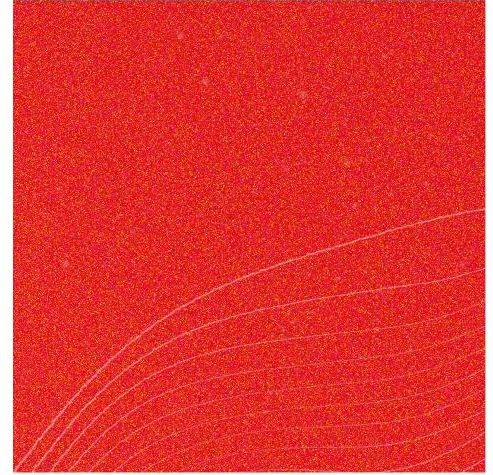
Affordable Identity

A rise in digital interactions and frictionless cashless payments is intersecting with dramatic declines in the cost to capture and analyze customer data. As a result, it's finally affordable to identify your most valuable customers.

Loyalty isn't a promise. It's a pattern, traced in cashless swipes and scans, refined in swift analysis work of AI. Traditional points-based rewards programs are losing relevance and usefulness as brands shift towards behavior-based incentives, connected to customer data platforms that feel more natural

So what? Hospitality brands, ranging from high frequency/low-AOV (average order value) QSRs to low-frequency/high-AOV cruise lines, can all build customer data platforms and loyalty programs that inform promotions, customer investments, and product development. And in return for providing their data, consumers want to feel understood and valued. The future of loyalty isn't transactional—it's about finding the VIPs and making them feel like VIPs without them having to ask.

Where it's happening:

McDonald's

McDonald's Digital Pulse → AI-powered offer-generators shape appetite, weaving promotions so precise they feel like fate. A rise in traffic, powered by personalized nudges.

Chipotle & Chick-fil-A

Chipotle & Chick-fil-A's Infinite Loop → Mobile ordering, gamified experiences, and app rewards make loyalty effortless: customers tap to order, earn points automatically, and redeem without a second thought.

Delta

Delta's SkyMiles Seduction → Logging into SkyMiles unlocks free Wi-Fi, seamlessly tying online engagement to travel rewards and keeping customers plugged into Delta's ecosystem.

25%

Brand loyalty will decline 25%, but usage of loyalty programs will increase. (Source: Forrester)

Category 3: Technology

Consider: How might we foster community among our consumer groups and create broader brand fans, not just individual relationships within their segment? How might we measure customer lifetime value at transaction and attitudinal levels? Don't chase; just attract. Gamification can entice customers between purchases, helping to tailor perks and rewards to behavioral archetypes, rather than outdated "earn and burn" models.

Frontline Bots

Robots are no longer hidden in the kitchen. Now, they meet you at your table.

Automation was once invisible to the customer, relegated to warehouses and ghost kitchens. But in 2025, robots aren't just behind the scenes. With an increase in processing power, decrease in IoT component prices, and onboard AI, they have become savvy and safe enough to show up in front of the customer.

So what? Realistic use cases for robots aren't about replacing humans, they are about handling low-level tasks which then allows humans to focus on high-value customer and employee interactions.

Where it's happening:

Chipotle

Chipotle's Guacamole Robot → An AI "chef" slices, scoops, and smashes 60 avocados per minute—eliminating waste while doubling efficiency.
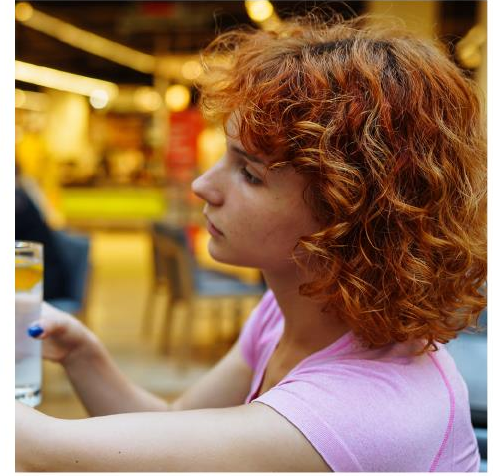
Automated kitchens

Automated Airport Kitchens → Major hubs like Heathrow and JFK airports are rolling out robotic kitchens that can prepare made-to-order meals in under five minutes.
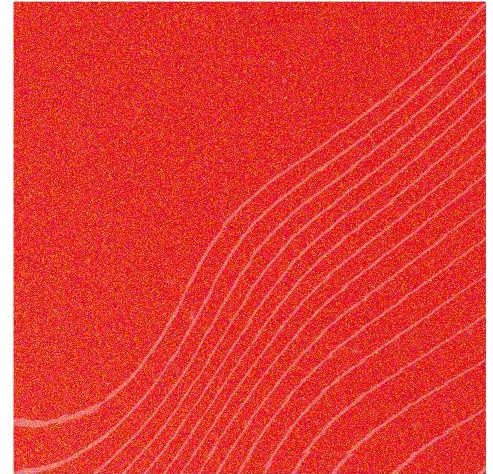
Robot-Run

Robot-Run Fine Dining → In Tokyo's Dawn Avatar Café, remotely controlled robots serve guests, allowing disabled employees to work as servers from home.

Consider: What business value could a robot provide? Use robotics to enhance service, streamline kitchens, and power drive-thrus that move fast without losing the human connection.

The future belongs to the brands that are chosen intuitively.

The world doesn't need **another five-star hotel, another app, or another airline rewards program.**

It needs brands that create **experiences so rich, so intuitive and so inevitable** that they don't feel like a choice. And it needs brands that anticipate needs and create delight in ways that earn the hearts, minds, and wallets of their customers.

They feel like destiny. And they have a firm grasp on their identity, and their customers' identities, in ways that allow symbiotic relationships to blossom, enabled by often-invisible technology.

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