LS:N GLOBAL

THE : FUTURE : LABORATORY



Travel & Hospitality Futures

Optimised Odysseys

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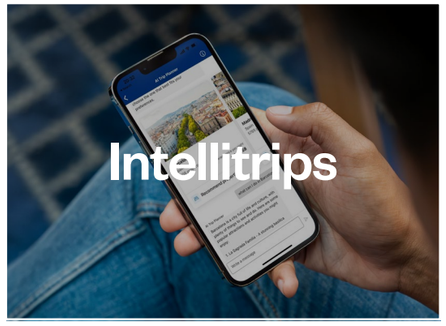
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Cover and above: Summer of Chaos by **Db**, Norway

At a Glance

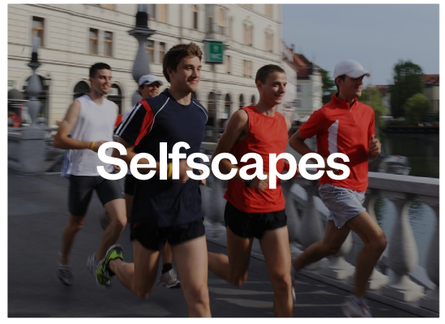
Key topics and takeaways from the report



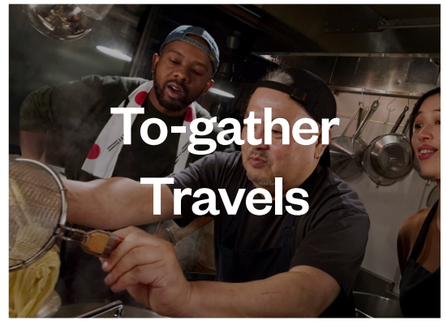
Tech-driven travel systems power seamless, anticipatory, hyper-personalised journeys with smarter automation.



A realism renaissance is under way, favouring off-grid escapes and nature-first travel that prioritise awe, authenticity and emotionally resonant experiences.



Travel becomes identity-led, as diverse solo journeys and niche communities carve out space for self-expression on the road.



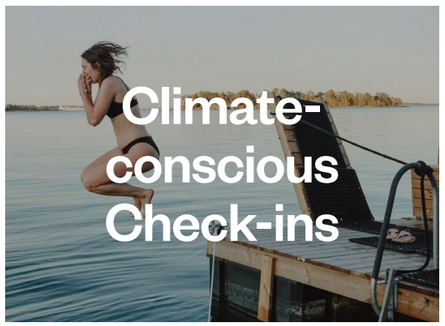
Togetherness is supercharged as entertainment-led and community-driven journeys transform destinations into collective celebrations.



Travellers look past overcrowded icons, drawn instead to unexpected hubs alive with novelty and cultural spark.



Post-luxe travel embraces sensory design, ritual, heritage connection and human-centric service, transforming travel into emotive, lasting and deeply relational, reaching beyond materialism.



Sustainability and carbon-conscious, quantified travel become essential non-negotiable demands.



Shifting values spark new aspirations, blending past and future into a pursuit of rarity, ineffable beauty and boundary-pushing experiences.



Nomadism shifts from lifestyle to necessity, fuelled by volatility, migration and portable digital identities that blur life stages and travel modes.



Hybrid realities arrive, where virtual and spatial technologies elevate escapism to new heights, unlocking journeys that are both mind-bending and world-expanding.

Key Statistics

Images left to right: Unplugged, UK; AI imagery by The Future Laboratory, UK; Zulal Wellness Resort by Chiva-Som, Qatar

40% of global travellers have already used AI-based tools to plan their trips and **62%** are open to using them in the future (source: Kantar)



63% of travellers are open to using AI at times for planning, booking and experiencing their hotel stay, rising to above 90% among Gen Z (source: Siteminder)



Luxury travellers are

2 to 3 times more likely than mass travellers to say they are travelling in order to disconnect or detox from digital devices (source: McKinsey & Co)

Young adults are spending

1,000

fewer hours on in-person contact annually (source: University of Rochester)

Sports tourism now accounts for

10% of global tourism expenditure, which is expected to grow by **17.5%** between 2023 and 2030 (source: UN World Tourism Organization)

Wellness tourism is one of the fastest-growing markets in the travel sector and is expected to be valued at

£1 trillion

($1.4 trillion, €1.2 trillion) by 2027 (source: Skift, Global Wellness Institute)



Key Statistics

Images left to right: Pursuit of Feeling by Black Tomato, Greenland; Kimpton x Tiny Zaps, US

58% of Gen Z and Millennials prioritise experiences over possessions (source: Globetrender/Ibis)



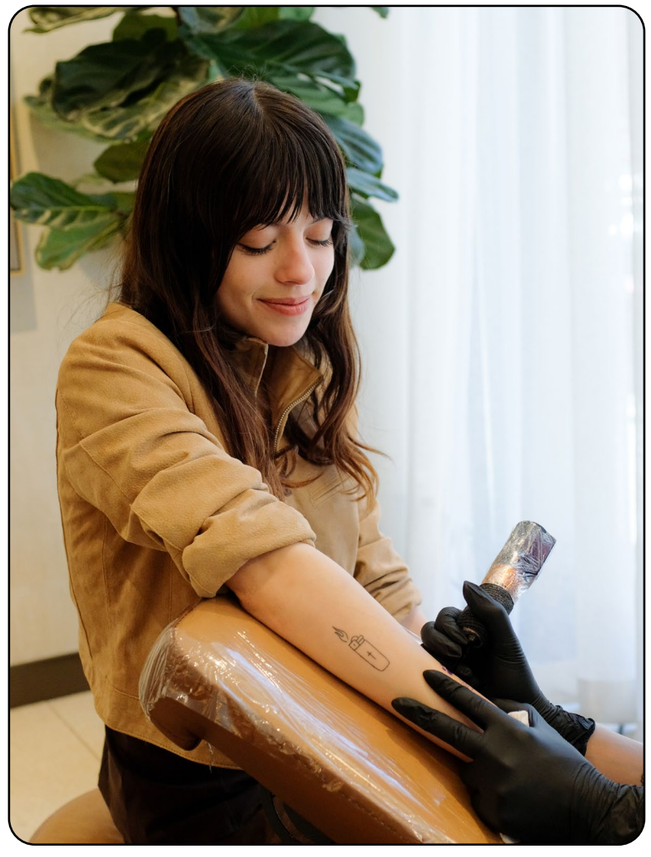
Extreme tourism is poised to rise to

£68bn

($91bn, €78bn) by 2032, representing a **14.4%** compound annual growth rate (CAGR) from 2023 to 2032 (source: Travel and Tour World)

44%

of Intrepid Travel's bookings come fromsolo travellers, **72%** of whom are female (source: Adido Digital/ABTA Travel Trends conference)



Travellers are

1.3 times

more engaged and **1.7 times** more likely to pay more for emotionally engaging experiences (source: FTN News)

India is investing

£353m

in developing over 100 new tourist destinations (source: Skift)

76% of Gen Z and Millennials in the US indicate that their travel experiences significantly reflect their personal identity (source: Thrillist).

Introduction

Travel has entered a redefining age in which every element must be optimised, from planning to presence, to deliver truly purposeful, personalised and participatory experiences.

Lead analysts

Fiona Harkin, *Director of foresight*
Seyi Oduwole, *Foresight analyst*

Consumer Foresight and Trends Intelligence, powered by LS:N Global

The travel industry finds itself at a compelling crossroads, vulnerable both to rapid change and to shifting global realities. Rising political instability, climate volatility and an overtourism backlash are just a few of the forces reshaping the future of international movement.

Yet amid the uncertainty, traveller expectations are evolving and rapidly redefining what a journey should be. People will increasingly seek trips that are frictionless yet offer profound pause; that are technologically enhanced yet deeply human.

As outlined in our macrotrend report, The Synthocene Era, the age of AI will usher in a period when, ideally, an invisible layer of ambient intelligence will reshape consumer expectations, enabling hyper-personalised journeys while freeing travellers from attention-absorbing tech that allows them to be present in the moment.

AI will act as both silent orchestrator and experience amplifier, optimising logistics without erasing the serendipity that can often make travel transformative. Some 40% of global travellers have already used AI-based tools to plan their trips, signalling that predictive, invisible tech will soon be embedded into every stage of the travel journey (source: Kantar).

As consumers seek joyful and social voyages that reflect their identity, global leisure travel spending is projected to triple, from £3.7 trillion ($5 trillion, €4.3 trillion) in 2024 to £11.2 trillion ($15 trillion, €12.9 trillion) by 2040 (source: Boston Consulting Group).

Social fragmentation is driving the rise of ever-more niche, community-led formats and multi-generational adventures. Tomorrow's travellers will navigate extremes: choosing between grounded, climate-conscious realism and hedonistic fantasy-fuelled experiences, powered by spatial computing.

At the same time, new and emerging travel epicentres will attract explorers seeking fresh, authentic journeys beyond overcrowded cities and viral hotspots, upending traditional, dominant travel patterns.

As Natasha Shafi, CEO of Mr & Mrs Smith, a boutique and luxury hotel booking platform, tells The Future Laboratory: 'Travel will no longer be just about escape, it'll be about expansion. The most sought-after stays over the next decade won't be defined by extravagance, but by how they move and change you.'

Luxury is no longer about what you have, but about the time taken to focus on what you feel. Businesses must adapt or be left behind.

For travel and hospitality brands, optimisation will no longer provide a competitive edge – it will become a basic standard. Investing in predictive service models, for example, or biometric integration to remove friction throughout the journey, while also crafting unique human touchpoints – from sensory design to storytelling-led excursions beyond the reach of algorithms – will be crucial differentiators for those aiming to lead the future of the industry.

New growth will come from curating the extreme ends of the travel spectrum: ultra-grounded, climate-conscious realism on one side and high-tech, hyper-immersive escapism on the other. The winners will be those that create journeys that feel both flawlessly engineered and emotionally unforgettable. The question for the decade ahead is clear: in a dawning age of Optimised Odysseys, how will your brand be positioned to succeed?

'Travel will no longer be just about escape, it'll be about expansion. The most sought-after stays over the next decade will be defined by how they move and change you'

Natasha Shafi, CEO, Mr & Mrs Smith





Methodology

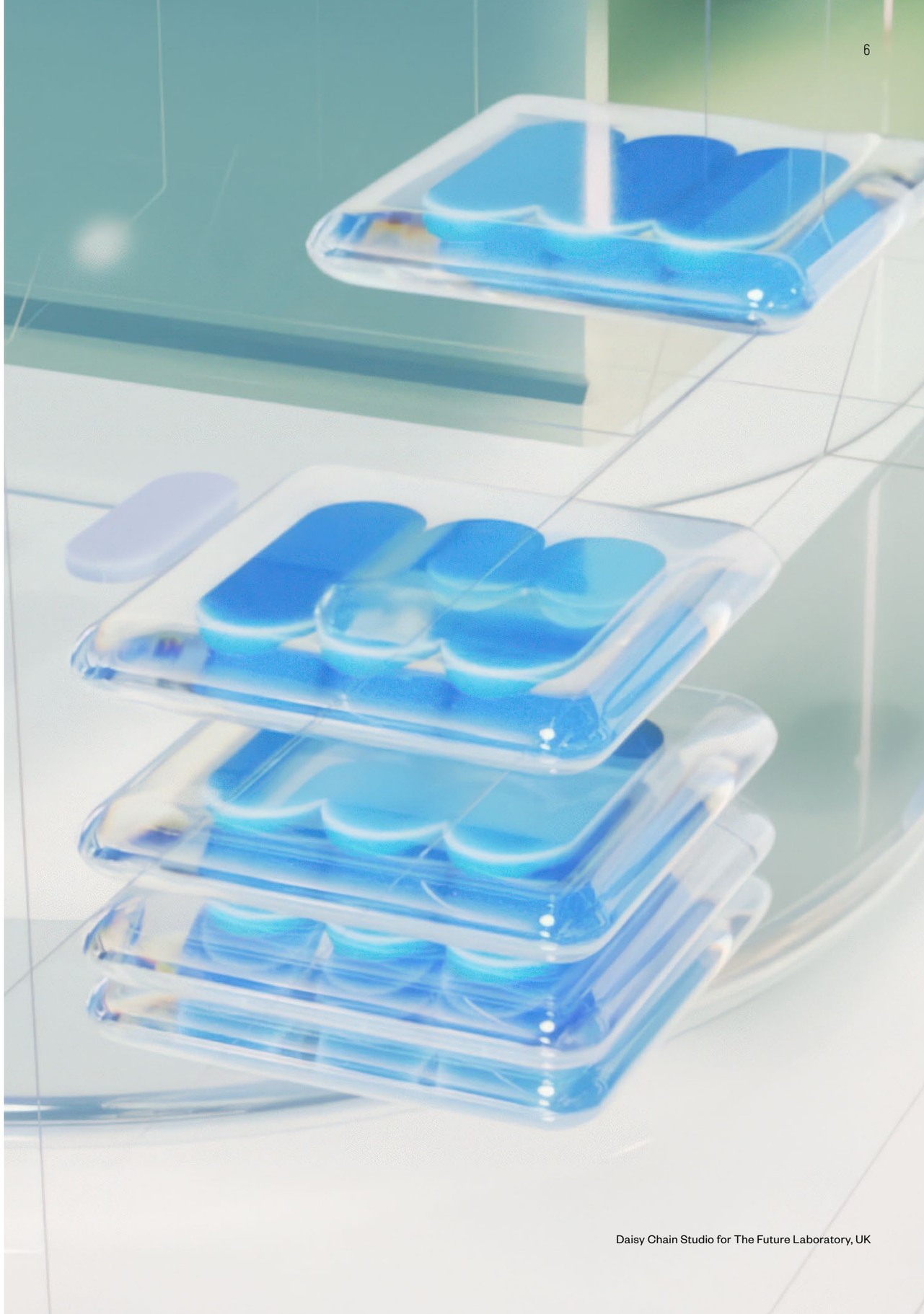
Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is **provable, practical** and **minimises uncertainty**.

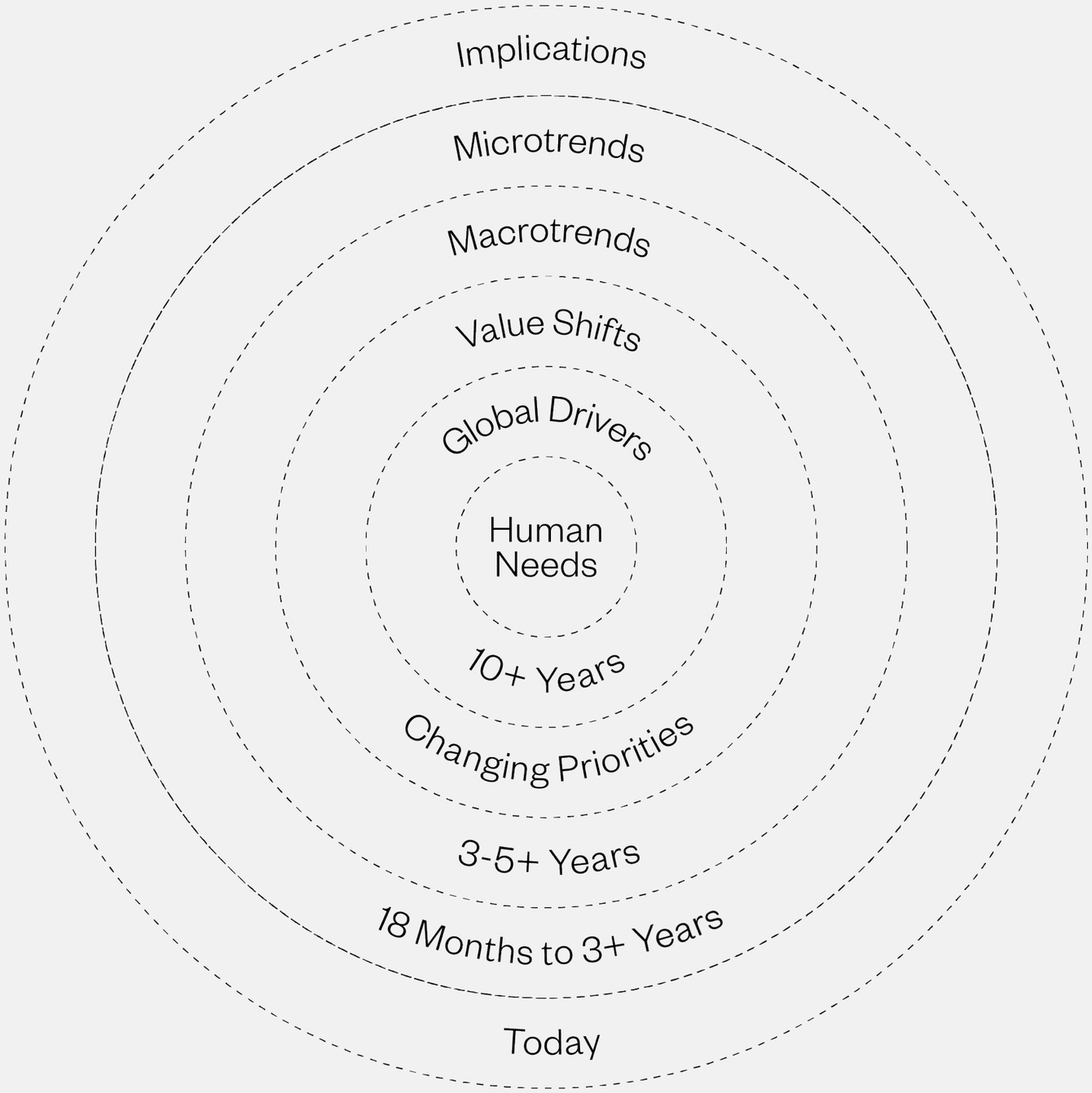
We do this by understanding the influence of **six global drivers** causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging **macrotrends** and **microtrends**, and ascertain what their implications are for the future landscape.



Daisy Chain Studio for The Future Laboratory, UK



The Future Laboratory's proprietary foresight methodology

Methodology: Foresight Process

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-years+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories.

Methodology: **Global Drivers**



Accelerating Technologies

For billions of people around the world, technology has become enmeshed with their humanity – often clashing as we adjust to this new Synthocene Era. Adoption and innovation continue to accelerate, specifically AI, and increasingly, quantum technology.



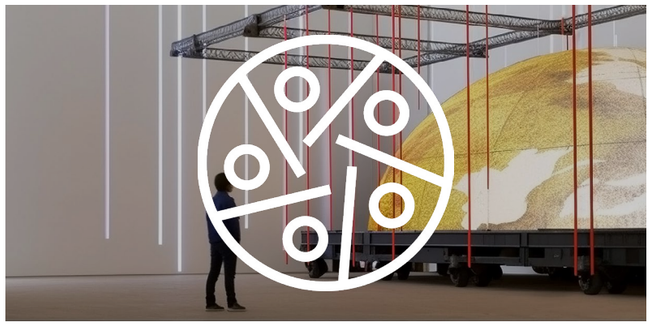
Climate Crisis and Resource Scarcity

We are at a climate tipping point, with increasing disruption and devastation across the globe. Urgency has turned into emergency, existentially threatening humanity and industry. But a growing sense of pragmatism over doomerism is clashing with industry roll-backs on sustainability commitments.



Evolving Demographics

Over the next decade the shape of our global population will change dramatically. Global economic instability due to falling fertility rates and ageing populations in some regions may be rebalanced by a growing youth workforce in others – with far-reaching repercussions for societies and industries.



Fragmenting Societies

Fractious inequalities and divisions are being exposed in a fast-changing, unstable world. The deterioration hinges on the increasing fragility and fragmentation of social, political and environmental ideologies, driving factions into isolated silos and societal polarisation, with apathy and misinformation clouding the way forward.



Micro-globalisation

The liberalised world we live in is inextricably interconnected but it has left us in a state of co-dependency rather than cooperation. Without equitable alignment, resilience may never come from an integrated and interdependent global economy, championing a renewal of localism and national pride.



Urbanising World

Despite the repercussions of a global pandemic, cities remain the epicentres of society. Priorities for living, working and playing in these urban environments are being redefined, with liveability, connectivity, sustainability and health and wellbeing becoming expectations rather than aspirations.



‘An air travel experience could be so fast you are through in 10 minutes, from entry into the airport to boarding the plane’

Lennard Niemann, managing director, GHARAGE

Optimised Odysseys
Norwegian luggage brand **Db**’s Summer of Chaos campaign highlights how its products help bring order to hectic travel experiences, Norway

Drivers

At a critical inflection point, the future of the travel sector is being shaped by the kind of global upheaval that is forging a new world order – politically, environmentally and technologically. Consumers hold a paradoxical mindset, increasingly demanding tech-enhanced journeys while craving stillness, respite and real-world connection.

What are the drivers of a macrotrend?

These drivers define the landscape from which the macrotrend is emerging, detailing the consumer attitudes, market and sector shifts, as well as the cultural, social, economic, political, technological and environmental forces shaping a macrotrend. Each driver emerges from one or more of our global drivers



Travel Tech-over

Journeys are no longer stitched together by clunky touchpoints; travellers now expect predictive, intuitive pathways where technology dissolves into the background, enabling frictionless flow from dream to destination.



Vitality Voyages

Travel transforms into a vessel for renewal, where body and spirit are recalibrated through purposeful escapes that spark joy, nourish wellbeing and weave meaning into every step.



Society in Motion

In an era of economic, environmental and geopolitical turbulence, travellers crave simplicity, safety and trust. True value lies in journeys grounded in localism and calm.



Social Splintering

Social isolation and changing demographics fuel travel focused on community, flexible formats and personal discovery.

Travel Tech-over

The travel industry is undergoing a seismic shift, powered by the advance of AI, spatial computing and smart automation – the hallmarks of the Fourth Industrial Revolution. This new phase is defined by ambient, seamlessly integrated AI that is shifting the marketing landscape from attention wars to recommendation wars.

While ambient technologies such as AI agents and smart glasses promise hyper-personalised, intuitive journeys, growing concerns about ethics and the morality of AI are fuelling a counter-movement – one that values nature, nostalgia, realness and human connection as essential antidotes to the relentless forward march of technology. In travel, every stage of the journey is being re-imagined. From discovery to booking, travel platforms such as TripAdvisor and Hopper now use machine learning for itinerary planning.

Lennard Niemann, managing director of GHARAGE, the innovation lab of global travel retail business Gebr. Heinemann, tells The Future Laboratory: 'An air travel experience could be so fast you are through in 10 minutes, from entry into the airport to boarding the plane.'

With tech giants racing towards singularity (the point at which AI matches human intelligence), the travel sector is fast becoming a consumer flashpoint representing the symbiosis of human and machine.

With Accenture predicting the AR market alone will reach more than £147bn ($200bn, €170bn) by 2028, the travel and hospitality sector is poised for transformation by hyper-personalised AI, seamless automation and immersive virtual experiences, reshaping the very nature of exploration.



Tripadvisor's rebranding by creative studio **Koto** focuses on the human-side of travel, UK

Global Driver
Accelerating Technologies

Travellers expect frictionless and hyper-personalised journeys. Technology will act as an invisible enabler, streamlining processes from booking to in-destination experiences

‘Gen Z prioritise unique, adventurous experiences and often view travel as a form of self-discovery and a reset button for their wellbeing’

Roya Zeitoune, head of YouTube Culture and Trends, EMEA





Left and above: Zulal Wellness Resort by Chiva-Som, Qatar

Vitality Voyages

Consumers today are prioritising wellbeing, with a focus on personal growth and self-care. The pandemic ignited a global self-optimisation movement, with health now a bigger priority than ever. Running clubs are replacing pubs and sober gatherings are overtaking raves as the destination du jour. Sports tourism accounts for 10% of global tourism expenditure and is expected to grow by 17.5% between 2023 and 2030 (source: UN World Tourism Organization).

In this polycrisis era, overlapping global challenges are driving people to seek control, safety and fulfilment – and wellness travel is answering that call. Roya Zeitoune, head of YouTube Culture and Trends, EMEA, tells The Future Laboratory: ‘Gen Z prioritise unique, adventurous experiences and often view travel as a form of self-discovery and a reset button for their wellbeing.’

Holistic health holidays are on the rise as consumers pursue science-backed self-improvement. Wellness tourism is one of the fastest-growing markets in the travel sector, and is expected to reach £1.06 trillion ($1.4 trillion, €1.2 trillion) in value by 2027 (source: Skift, Global Wellness Institute).

Rising sports participation is fuelling demand for transformational escapes, as rest becomes vital and good health is the newest status symbol. Preventative care, bespoke programmes and therapeutic self-discovery are now defining the next phase of travel.

With traditional milestones of adulthood increasingly out of reach (home ownership, for example), consumers are finding achievement and community through other channels, such as shared fitness interests. Growing markets such as China, as explored in our China’s New Fitness Boom report, are contributing to this expansion of the global wellness tourism landscape.

Health-focused tourism is also booming, with 47% of global travellers spending between £3,725 ($5,000, €4,305) and £7,455 ($10,000, €8,610) per wellness trip and another 44% spending between £7,455 ($10,000, €8,610) and £18,635 ($25,000, €21,520) per trip (source: Forbes).

Global Driver
Evolving Demographics

Travel driven by wellness and sport is growing, reflecting travellers’ desire to balance achievement with restorative respite from a turbulent world

‘Geopolitical instability is the biggest travel risk for 2025… travellers are aware of how conflicts, currency destabilisation and inflation can change the landscape of a destination’

Dan Richards, CEO, Global Rescue

Unplugged offers off-grid cabins designed for switching off, escaping screens and recharging in nature. Photography by Adam Firman, UK

Society in Motion

In an age of relentless overstimulation, paired with significant global upheaval, consumers are increasingly craving stillness, simplicity and a sensory minimalism. This shift is fuelling a surge in analogue-inspired social experiences and the growing popularity of Digital Detox Destinations, places where technology is left behind and a focus on how individuals feel – not how they perform or have to constantly react – takes centre stage.

Dan Richards, CEO of Global Rescue and a member of the US Travel and Tourism Advisory Board at the US Department of Commerce, explains: ‘Geopolitical instability is the biggest travel risk for 2025… travellers are aware of how conflicts, currency destabilisation and inflation can change the landscape of a destination’ (source: The HR Director). As a result, traveller mindsets are gravitating towards ‘considered destinations’, valued for cultural depth, stability and personal significance.

Pervasive digital devices and an always-on culture are fuelling a growing desire to rediscover liminal spaces that encourage mental and physical respite. Leading the charge are luxury travellers, who are two to three times more likely than mass travellers to say they are travelling to disconnect or detox from digital devices. This reflects an ever-growing appetite for privacy, wellbeing and escape from hyper-connectivity (source: McKinsey & Co).

Travellers are discovering what truly matters, moving value beyond materialism towards intentional, rich and meaningful experiences, as outlined in our New Codes of Value macrotrend.

Global Driver
Fragmenting Societies, Urbanising World

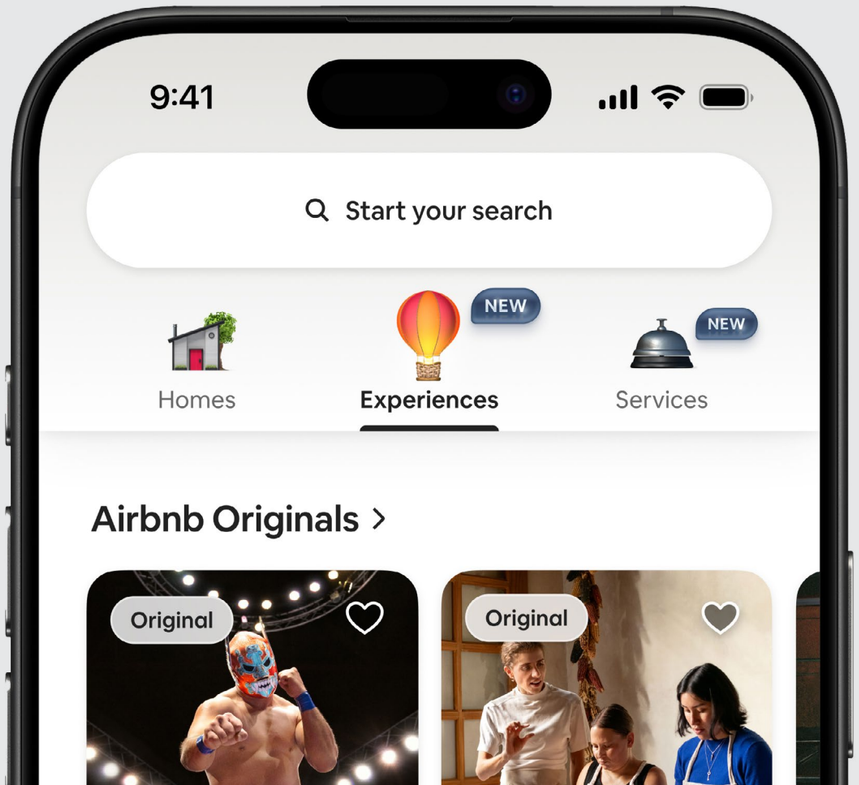
Consumers now seek safety, localism and trust. Businesses must navigate instability while offering a deeper sense of value and ‘enoughness’

‘The future of hospitality is about connection – supper clubs and curated dinners – the industry is about bringing people together in meaningful ways’

Source: Aya Tohme, communications and partnership manager, Timeleft



Left: Airbnb Experiences, US; above: Craft noodles and broth with a ramen legend by Airbnb Experiences, Setagaya City. Photography by Saeka Shimada, Japan



Social Splintering

Amid the rise of digital slop and algorithm-driven echo chambers, consumers are craving what feels real and tangible. Hyper-personalisation, urbanisation and increasingly isolated lifestyles have fostered a culture in which community is traded for convenience.

The US Surgeon General’s 2023 comments on a loneliness epidemic highlighted social fractures, noting that time spent alone increased by 24 hours per month between 2003 and 2020 (source: US Department of Health and Human Services). Togetherness, once a cornerstone of human experience, has eroded.

Retailers and brands are responding by creating third spaces – physical environments designed to bridge this gap and foster real-world interaction.

Aya Tohme, communications and partnership manager at social events platform Timeleft, tells The Future Laboratory: ‘The future of hospitality is about connection – supper clubs and curated dinners – the industry is about bringing people together in meaningful ways.’

Evolving family dynamics, such as declining marriage rates and the rise of multi-generational and solo travel, signal broader shifts in how people define identity and belonging. Consumers are actively seeking like-minded communities, driving a ‘collectivism reset’ – a shift towards greater collective wellbeing and social responsibility.

The expanding realms of globalisation, nomadism, migration and flexible working are pushing identity into flux, prompting a new era of soul-searching, spirituality and hyper-tailored travel experiences.

In a society that feels increasingly apathetic and more transactional, enriching connections through travel has become the ultimate currency.

Global Driver
Evolving Demographics, Fragmenting Societies

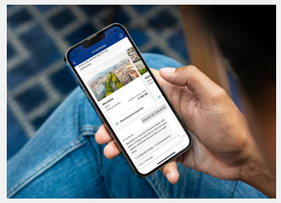
With new types of consumer groups and community-seekers emerging, travel must offer emotional resonance, flexible experiences and socially driven design to fulfil their needs

Insight

The travel and hospitality sector's future will be defined by a tension between new technologies and a growing desire for authenticity, pushing industry players to design journeys that combine innovation with trust and wellbeing.

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2030. Insights help brands and businesses to understand and identify the opportunities presented by this trend



Intellitrips

Tech-driven travel systems enable anticipatory, hyper-personalised journeys with smarter automation.



Souljourns

A renaissance of realism calls for unplugged odysseys; off-grid retreats and nature-first immersions that awaken awe, celebrate authenticity and are deeply emotionally enriching.



Selfscapes

Identity now sets the compass. From solo wanderers to niche tribes, travel becomes a canvas for self-expression, carving intimate journeys where individuality thrives.



To-gather Travels

Togetherness is supercharged as entertainment-led and community-driven journeys transform destinations into collective celebrations.



Emerging Epicentres

Beyond the crowded icons, new cultural frontiers beckon as unexpected hubs come alive with novelty, spark and the thrill of discovery.



Gilded Luxury Travel

Luxury evolves beyond material trappings into sensory design, ritual and heritage. Here, service is intimate, travel is relational and experiences linger long after return.

Intellitrips

An emerging era of frictionless travel is unfolding, powered by AI, predictive systems and seamless automation, enabling unburdened, hyper-personalised and intuitive journeys.

According to an Amadeus study, 41% of travel companies say their organisation has the budget and resources in place to implement generative AI, despite having concerns about the technology.

Similarly, Accenture highlights how consumers are 1.5 times more engaged and 1.7 times more likely to pay more when brands offer emotionally engaging experiences powered wby generative AI tools.

The industry is responding. Leading global online travel platform Booking.com and OpenAI have partnered, signalling the dawn of more intuitive and conversational travel planning (source: OpenAI).

Qatar Airways' partnership with Starlink, the satellite internet division of aerospace company SpaceX now offers ultra-fast in-flight connectivity, enabling passengers to stay connected and engaged throughout their journey.

Insights from Zartico show 53% of Gen Z and 57% of Millennials prefer personalised travel planning aided by AI travel planning tools, signalling a generational shift in trust and expectations.

Platforms such as Airbnb are evolving into all-in-one 'super apps', curating personalised experiences and streamlining every stage of the travel journey. United Airlines has revamped its mobile app to give real-time updates on connecting flights. Meanwhile, Latin America's leading airline, Avianca's new accessibility-first website sets a new benchmark for inclusive design.

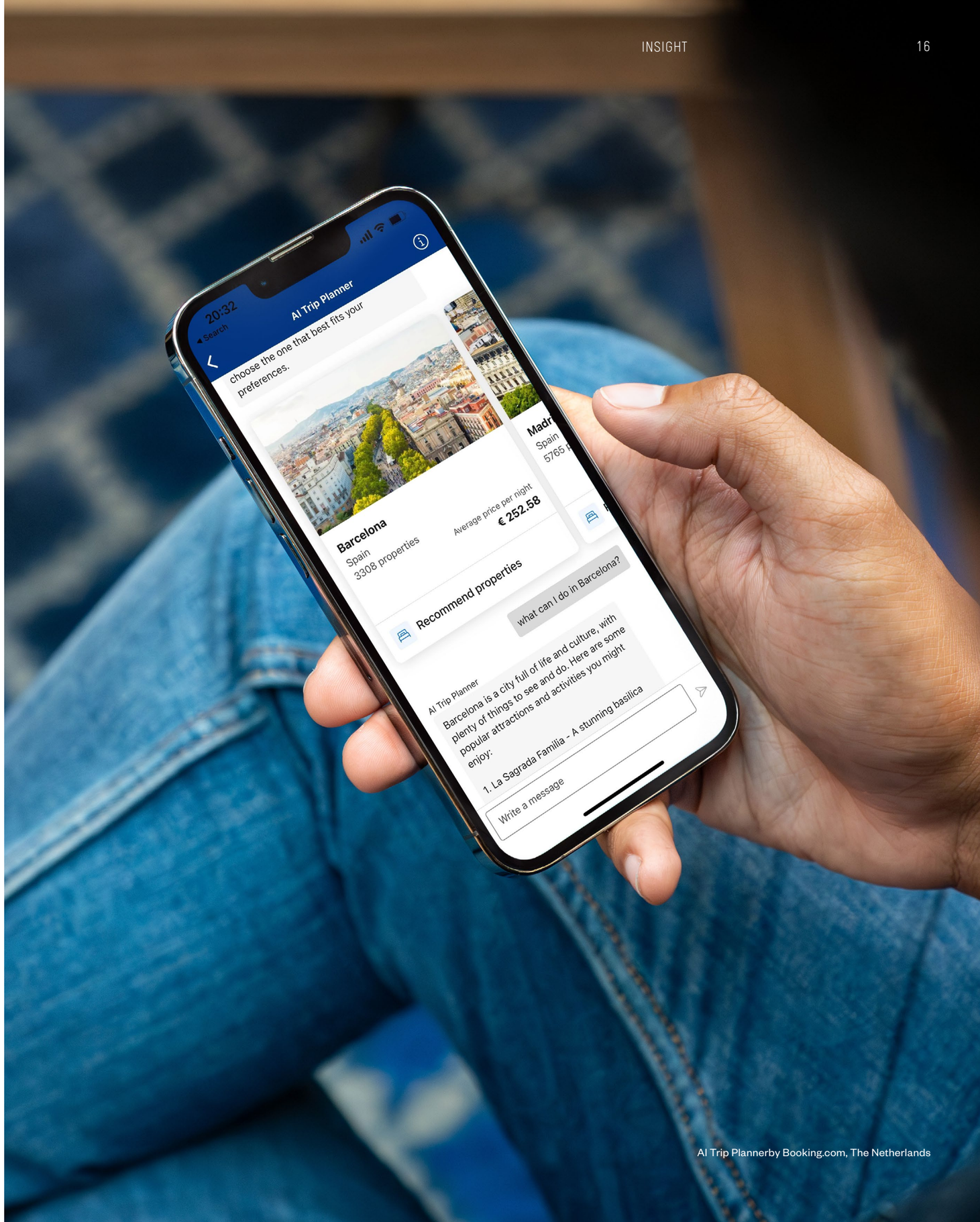
Vikas Bholan, co-founder and CEO of digital identity company Neoke, explains to The Future Laboratory that 'the holy grail of travel is the connected trip'. This will knit together the 'huge amount of fragmentation' in the current travel landscape, creating a seamless, personalised experience across all four journey stages (planning and itinerary, booking and payment, fulfilment and in-trip experiences). He adds that this must be enabled by a privacy-centric infrastructure and will lead to an 'intelligent' and 'trusted' future.

From an aviation perspective, Nadine Heubel, senior vice-president of operations at One World Alliance, a global alliance of 13 member airlines, notes in conversation with The Future Laboratory that airport lounges are 'evolving into standalone destinations'.

GHARAGE's Niemann adds: 'When you then look into the more evolving markets such as the GCC region, Southeast Asia or China, you see that airport their infrastructure is already way more modern or zeitgeisty, which makes them an easier breeding ground to adapt innovation. The pace of innovation is quicker in America and partly even in Southeast Asia because of a fail-fast mentality towards testing and learning instead of planning and trying to execute.' Niemann envisions a future airport experience will be 'fluent and blended'.

'For me, the holy grail of travel is the connected trip'

Source: Vikas Bholan, co-founder and CEO, Neoke



AI Trip Plannerby Booking.com, The Netherlands



Souljourns

A realism renaissance is taking hold in travel. In response to the climate crisis and overtourism fatigue, a new wave of travellers are seeking off-grid, emotionally resonant voyages rooted in nature, culture and authenticity.

Among Gen Z and Millennials globally, 76% indicated that their travel experiences significantly reflect their personal identity. Additionally, 72% affirmed that travelling is central to their sense of self and serves as a key means to reconnect with their inner self (source: Thrillest). Meanwhile, 73% of travellers want their spending to directly benefit local communities and 77% seek authentic experiences that reflect the region's culture. (source: Booking.com).

British luxury travel company Black Tomato's game-changing Feelings Engine matches travellers to destinations based on mood and emotion, ushering in a new era of emotionally intelligent travel planning.

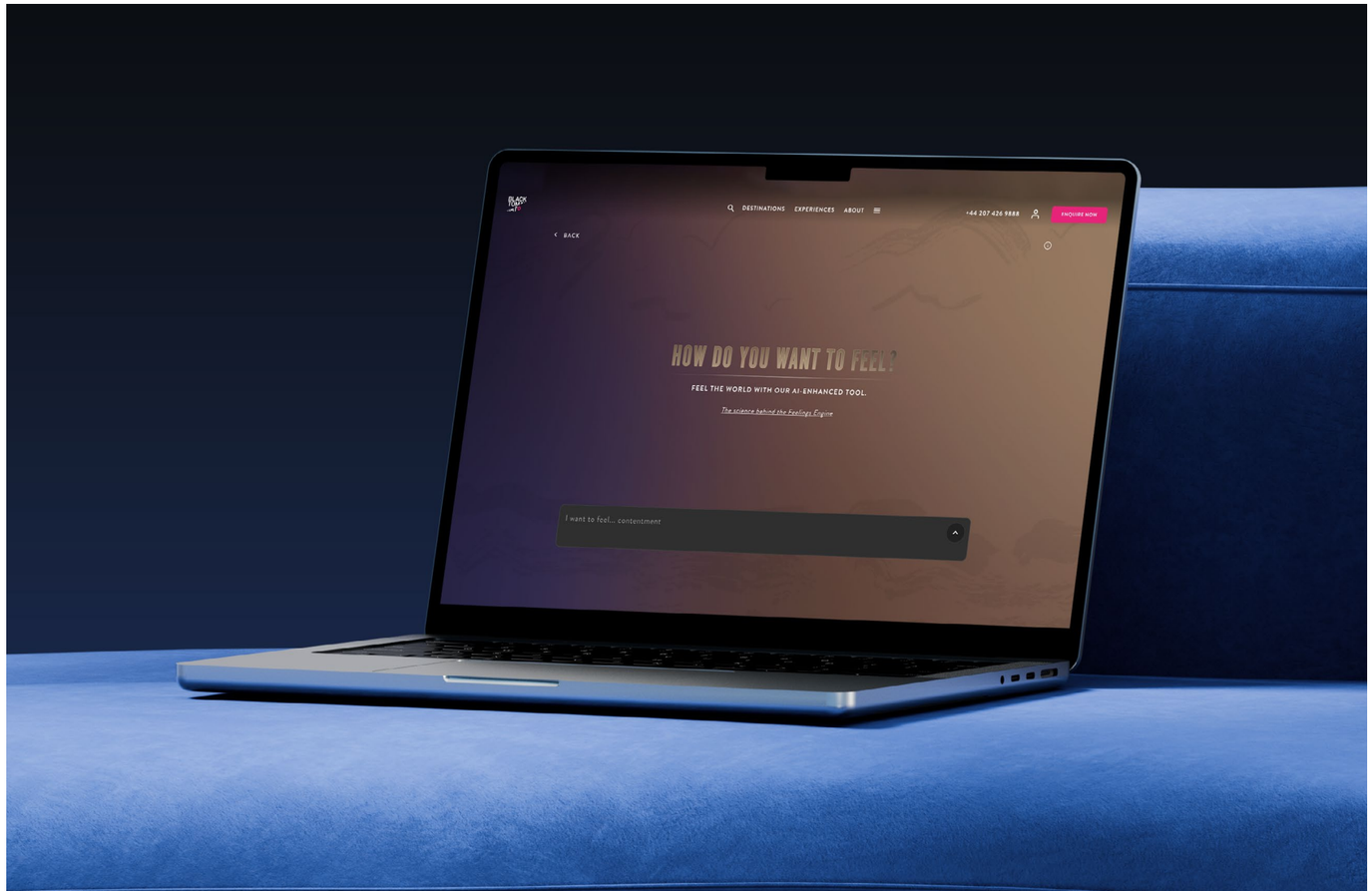
UK-based operator Contiki responded in June 2025 with new eco-conscious trips across Kenya and Tanzania, focusing on cultural connection and conservation. Meanwhile, Canada's Hurtigruten Expeditions has introduced Arctic community-led expeditions, offering access while ensuring Indigenous stewardship.

Nature tourism generates more than £465bn ($600bn, €550bn) in revenue globally with trends like Noctotourism (experiences designed around night-time activities such as stargazing) recently gaining traction (sources: World Tourism & Travel Council, The National News).

Calum Morrison, founder of The Extraordinary Adventure Club, describes luxury travel as a vehicle for personal change and the future of travel as 'less about opulence and more about emotional resonance'. He tells The Future Laboratory that 'we want travel that truly moves us'.

This sentiment is echoed by Natasha Shafi, CEO of Mr & Mrs Smith, a boutique and luxury hotel booking platform. As she explains to The Future Laboratory: 'Travellers are shifting from passive consumption to purposeful experiences, seeking substance over spectacle through local food, authentic stories and deeper cultural connection.'

As expectations evolve, brands must design for belonging and curiosity over mass consumption. The future of travel lies not in how far we go, but how deeply we connect with land, community and self.



Above: Pursuit of Feeling by Black Tomato, Greenland; Right: The Feelings Engineby Black Tomato, UK

93% of global travellers say they want to make more sustainable travel choices+

Source: Booking.com

‘The most extraordinary adventure is the exploration of oneself, to find the edges of yourself’

Calum Morrison, founder, The Extraordinary Adventure Club

Souljourns
Pursuit of Feeling by Black Tomato is a collection of destinations designed to ignite emotions. Travellers are matched through their AI-enhanced tool the Feelings Engine, Greenland



Run the World by Contiki, Switzerland

Selfscapes

No longer just a leisure pursuit, travel has become a form of self-definition. Across all ages and lifestyles, travellers are curating experiences that reflect who they are and what they need.

In May 2025, luxury tour operator Jules Verne, known for bespoke high-end travel experiences, partnered with Noon, a platform creating purpose-led journeys for 'Queenagers' – women aged 50 and above seeking fulfilling escapes.

Meanwhile, solo bachelorette trips are gaining popularity among Gen Z as empowering rituals of independence, with destinations such as Sedona in Arizona, Amsterdam and Bali offering wellness, culture and an energy reset before the wedding day.

Adventure-focused tour operator Intrepid states that 44% of its bookings now come from solo travellers – 72% of whom are women. Since COVID-19, Intrepid has seen a 22% rise in midlife solo female travellers using its services (source: Adido Digital).

Ageless adventures are rising as the 50+ travel market diversifies beyond the traditionally affluent Boomer profile. Ageing generations face different financial realities; many don't expect to fully retire, yet discretionary travel remains a powerful aspiration, particularly among women aged over 50, whose spending is projected to more than double to £407bn ($519bn, €445bn) by 2035 (source: Travel Pulse).

The 'golden gap years' are driving a new era of later-life travel, with nearly a quarter of retirees taking five or more holidays each year and a third dreaming of a bucket-list trip (source: Inspired Villages). Success lies in offering value-rich, flexible and once-in-a-lifetime experiences for a redefined retirement.

In January 2025, Contiki, a youth-focused travel company specialising in group tours for 18–35-year-olds, launched sober-curious itineraries including Run Club Trips across Europe, which combine travel with group running to appeal to fitness-first travellers.

Hospitality brands are also adopting this trend. In the UK, luxury hotel Mandarin Oriental Hyde Park created the ultimate Wimbledon experience, offering Centre Court tickets, private transfers and a curated dining experience for tennis enthusiasts in July 2025.

Elsewhere, active travel operator Backroads has introduced new active adventures, such as hiking and cycling, designed specifically for people in their 30s and 40s – an often-overlooked demographic in this market.

In North America, Gnome Surf opened ocean activities to travellers with disabilities. For LGBTQ+ travellers, travel guide publisher Lonely Planet launched its first dedicated guide, offering curated advice on inclusive destinations, safety tips and cultural insights across more than150 countries.

Expressions of identity extend to family dynamics and mental wellbeing too. Family therapy company Bluestone offers trips centred on family healing and counselling. Boram, a luxury maternal postpartum retreat, caters to new mothers seeking care and connection. Holistic wellness centre Bionic Bloom is bringing psychedelic-infused biohacking to travel itineraries, a move we tracked in our Psychedelic Innovations report.

Philippa Wagner, founder and creative lead of hospitality-focused creative strategy studio, PeoplePlacesSpaces, explains to The Future Laboratory how travel will celebrate those subjective, human qualities: 'Travel will return to its roots – it will be about wonder, discovery and the serendipitous moments that can't be algorithmically optimised.'

To-gather Travel

As travel increasingly serves as a conduit for identity-building, celebration and collective memory-making, a new wave of community-driven destinations is reshaping leisure around sociability and collective memory-making.

In 2025, luxury hotel brand Hilton partnered with McLaren Racing to launch a co-branded Formula One suite, blending premium hospitality with live sports culture to foster intimate, community-focused fan experiences.

According to Boston Consulting Group, global leisure travel spend is expected to grow from £3.9 trillion ($5 trillion, €4.6 trillion) in 2024 to £11.7 trillion ($15 trillion, €13.8 trillion) by 2040, with group and experience-based travel driving much of that growth.

Concurrently, travel planning website Trip.com revealed that theme parks dominated its list of top global travel attractions for 2025, highlighting the enduring appeal of collective, joy-filled, entertainment-led destinations.

In Bahrain, the Middle East's first surf park is scheduled to open in 2026, using cutting-edge Wavegarden Cove technology. Meanwhile, Disney's regional debut on Yas Island with Miral in the UAE brought its entertainment legacy to a new audience, offering immersive family experiences and fostering togetherness.

With more people travelling globally, social-based travel will gain momentum, combining storytelling, entertainment and immersive experiences.

Zeitoune tells The Future Laboratory: 'Travel tribes will increasingly replace traditional travel segments.' Travellers are inspired by platforms such as YouTube and TikTok, where they discover niche communities and explore virtually. There is growing demand for 'immersive, hyper-local experiences' that entertain and bring like-minded groups together. Zeitoune encourages brands to prioritise 'genuine storytelling and co-creation' over scripted promotions to truly engage these communities.





Left and above: Bahrain Surf Park, Bahrain

'Travel tribes' will increasingly replace traditional travel segments'

Roya Zeitoune, head of YouTube Culture and Trends, EMEA



Hilton Luanda Hotel Godinho, Angola, Africa

Emerging Epicentres

Travellers are shifting away from overcrowded hotspots towards lesser-known destinations that offer depth of experience and authentic discovery.

In Africa, across destinations including Ghana, Nigeria, Zanzibar and the Cape Verde Islands, curiosity is driving new travel patterns. According to Mr & Mrs Smith's Natasha Shafi, second-tier destinations in established tourist zones are also growing in popularity: 'Puglia, Oaxaca, Matera and Menorca are gaining attention not because of glossy campaigns, but because of the way they feel: grounded, sensory, soulful.'

Additionally, the strategy team at Construct London, a luxury brand strategy and creative consultancy, highlights Ras Al-Khaimah and Bhutan as emerging epicentres, telling The Future Laboratory that 'Bhutan has seen a surge of luxury resorts aiming to capitalise on its unique experiences and awe-inspiring natural beauty, from Gelephu Mindfulness City to Aman and Six Senses'.

A growing shift towards slower, culturally rich secondary cities reflects travellers' desire for depth and authentic connection. Bhutan, the world's first carbon-negative country, promotes high-value, low-volume tourism offering fewer but richer visits, encouraging slow, more immersive travel.

Recent developments highlight the value of this approach. Outdoor brand Arc'teryx launched China's first world-class climbing site at Shegeng Cave in 2024, attracting adventure-seekers to navigate this unexplored terrain.

In Africa, global hotel chains such as Marriott International and tour package company TUI, are increasing their footprint. Hilton Worldwide plans to triple its presence to over 160 hotels, responding to the continent's tourism boom, which includes Uganda's ambitious £4bn ($5.2bn, €4.8bn) infrastructure and hospitality growth plan (source: The East African).

Contiki's launch of new trips across Kenya and Tanzania in 2024 tapped into the demand for immersive, experience-led safaris and cultural adventures – further cementing Africa's increasing accessibility.

Middle East travel spending is projected to reach £271bn ($350bn, €323bn) by 2030, with Saudi Arabia already surpassing 100m tourists in 2024 (source: TTW, Ministry of Tourism Saudi Arabia). Urban innovation is playing a distinct role in this. Architecture firm HWKN's District 11 in Sharjah, UAE, represents the first AI-planned futuristic hub blending technology and culture to attract curious visitors.

Elsewhere, the Indian government aims to bring cruise passenger traffic in India to 1m by 2029, up from 471,000 in the 2024 fiscal year (source: Skift).

India is investing **£367m** ($474m, €437m) in developing more than 100 new tourist destinations

Source: Skift

Legacy Voyages
The Louis by Louis Vuitton is an exhibition and retail destination in Shanghai, celebrating the brand's iconic travel products, China



Above and right: La Dolce Vita Orient Express, Italy

Gilded Luxury Travel

Moving beyond material excess, post-luxe travel embraces sensory design, resonant rituals, heritage connections and human-centric service to create experiences that resonate on a deeper emotional level.

In January 2025, wellness brand Lumati partnered with the historic Hotel del Coronado in Southern California to integrate longevity-focused rituals into the guest experience, blending science with tradition to promote holistic wellbeing.

According to World Travel & Tourism Council, international visitor spending is forecast to reach £1.63 trillion ($2.1 trillion, €1.94 trillion) in 2025, surpassing the previous high of £1.47 trillion ($1.9 trillion, €1.76 trillion) in 2019.

Private jet bookings are increasing among Millennials, who now account for 50% of the business jet clientele at UK-based private jet operator Luxaviation (source: Luxaviation). This reflects a preference for exclusive, flexible travel as Millennials look set to become the wealthiest generation; £64.68 trillion ($84 trillion, €77.28 trillion) will be passed down to them in the 'great wealth transfer' by 2045 (source: Fortune).

Meanwhile, Boston Consulting Group identifies Millennials, Gen Z and travellers from emerging markets such as China, India, Indonesia, Mexico and Saudi Arabia as the next wave of luxury spenders.

Post-luxe travel also redefines value. Affluent travellers now seek experiences that evoke lasting emotions, prioritising legacy and innovation over display. Shafi defines future luxury travel as 'space, stillness and restoration' for wealthy travellers; it prioritises 'sanctuary over extravagance' and rejects 'performative' luxury, viewing it as 'a set of values rather than a price point'.

The most resonant and successful brands will be those that cultivate calm, foster genuine connection and spark curiosity, eschewing excess in favour of meaning.

Moreover, Anant Sharma, CEO of design consultancy Matter of Form, tells The Future Laboratory that brands should design a 'travel storyboard' for their clients; creating an experience arc like a music composition, where moments of tension or discomfort lead to joyful release. Businesses must design experiences that feel intimate, intentional and values-led, where the why of travel matters as much as the where.

This idea of meaningful connection is reinforced by PeoplePlacesSpaces' Wagner, who sees the future of luxury as rooted in connection: to ourselves, others, places and purpose.

'By removing much of life's serendipitous journey, luxury now represents the slower path. Amusingly, it has become the ultimate luxury to cook your own meal or pick your own herbs.'

Anant Sharma, CEO, Matter of Form

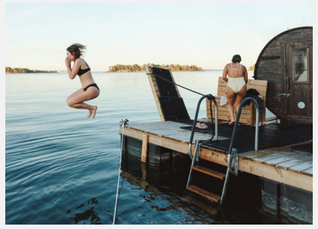


Foresight

Travel is evolving into a sentient system, engineering ethically attuned journeys that blend anticipatory technology, hyper-optimised options and blended-reality environments to craft purpose-led experiences that redefine the future of exploration.

What are the foresights of a macrotrend?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



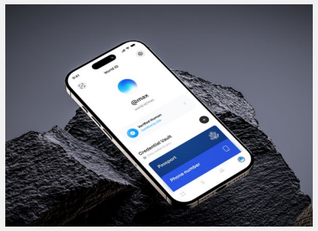
Climate Conscious Check-ins

Sustainability and carbon-conscious, quantified travel become essential, non-negotiable demands.



Future Nostalgia

Shifting values spark new aspirations, blending past and future into a pursuit of rarity, ineffable beauty and boundary-pushing experiences.



Cloud Citizens

Nomadism shifts from lifestyle to necessity, fuelled by volatility, migration and portable digital identities that blur life stages and travel modes.



The Travelverse 2035

Hybrid realities merge virtual and physical worlds, unlocking mind-bending, world-expanding journeys.

Climate Conscious Check-Ins

Despite scepticism, consumer appetite for sustainable travel continues to grow. The sustainable travel market is projected to expand from £2.76 trillion ($3.56 trillion, €3.28 trillion) in 2025 to £8.84 trillion ($11.39 trillion, €10.50 trillion) by 2034, driven by 80% of travellers prioritising sustainability (sources: Precedence Research, Travellyze). By the 2030s, superficial gestures will no longer suffice.

Darin Graham, climate reporter at global travel industry insights platform Skift, speculates that '2030 will be a wake-up call. In the future, we're likely to see more 'insetting' [a sustainability approach where travel businesses offset their carbon impact directly on-site]. Travel businesses will use carbon capture on-site, such as installing living walls or planting trees.'

'Quantified travel is already established with some airlines showing flight carbon footprints – but it needs to go further,' continues Graham. Forward-looking brands should consider building proprietary sustainability scoring systems for products and stays to lead in this space.

Graham also anticipates the rise of multi-mobility journeys, with AI helping travellers make more sustainable choices, from identifying renewable energy-powered hotels to mapping out low-carbon itineraries.

From Helsinki being ranked the world's most sustainable tourism destination to the rise of 'coolcations' in Alpine regions, climate-conscious check-ins will become essential for the future of travel (source: City of Helsinki). This is echoed by Shafi, who notes a growing preference for cool-climate summer destinations such as Scandinavia, Switzerland and the Alps, as a direct response to rising global temperatures.

Sharma foresees 'engineered scarcity' shaping travel's future, where limited access to unique destinations enhances allure, preserves authenticity and drives premium demand. By controlling visitor numbers, brands will transform hidden gems into exclusive, curated experiences. To tap into this, brands should curate small-batch, invitation-only or conservation-linked offerings that feel both rare and responsible.

In the years to come, 'pin-drop travel' – places where silence is golden – will see growing demand, according to Barker. Driven in part by overtourism at viral hotspots and travellers' growing 'nostalgic impulse to escape the noisiness of modern life', this shift will ease environmental strain by relieving pressure on overcrowded sites.

Barker also champions under-tourism, Indigenous-led conservation and regenerative 'Kintsugi travel', inspired by the Japanese art of repairing broken pottery with gold lacquer to create something more beautiful than before.

This will manifest as travel being an authentic force for good, benefitting both the visitor and the destination. Brands that will thrive in this coming era will need to forge long-term partnerships with Indigenous, conservationist or cultural regeneration projects and embed guests in narratives of repair, resilience and renewal.

Over **60%** of travellers said they are prioritising sustainability in their travel plans, a significant jump from **42%** in 2024

Source: Travel Agent Central



Lonna sauna experience, Helsinki. Photography by Julia Kivelä. Image courtesy of Helsinki Material Bank, Finland



Future Nostalgia

Blending past and future and driven by shifting values, new consumer aspirations will reshape luxury travel, with desire moving toward rarity, the ineffable and the boundary-pushing.

In a world where AI, automation and digital surrogates streamline every aspect of our lives, we risk drifting into synthetic existences – frictionless, efficient, but hollow.

Sharma also observes a tension between the rapid advance of AI and automation and a nostalgic return to analogue living. He states that 'analogue terroir' (the irreplicable and unique, time-worn character of a place, shaped by climate, culture and human touch) will add an irreplaceable layer of value to luxury, reminding us that even in a digitised world, true luxury retains a deeply human essence.

Adventure company Desert Island Survival has launched a castaway experience in the Maldives aimed at challenging travellers. Participants will learn essential survival skills like shelter-building, fire-making and foraging, before being dropped on an uninhabited island with only basic tools. There, they must rely on their training, teamwork and instincts to survive.

Consumers will actively seek out experiences that remind them of their humanity, that stir emotion, ignite curiosity and demand presence.

The Extraordinary Adventure Club founder Calum Morrison, argues that for luxury travel to be truly life-changing, it must involve a degree of jeopardy and hardship, shifting away from mere opulence and towards emotional resonance. He believes travel should challenge and ignite our core human traits – unpredictability and emotion – reconnecting us with what makes us feel alive.

These insights reveal luxury travel's future as a realm of profound, life-affirming challenges. Brands will need to align through radical experiences that reignite the inherent subjectivity of being an individual human.

Extreme tourism is poised to rise to **£70bn** ($91bn, €84bn) by 2032, representing a **14.4%** compound annual growth rate (CAGR) from 2023 to 2032

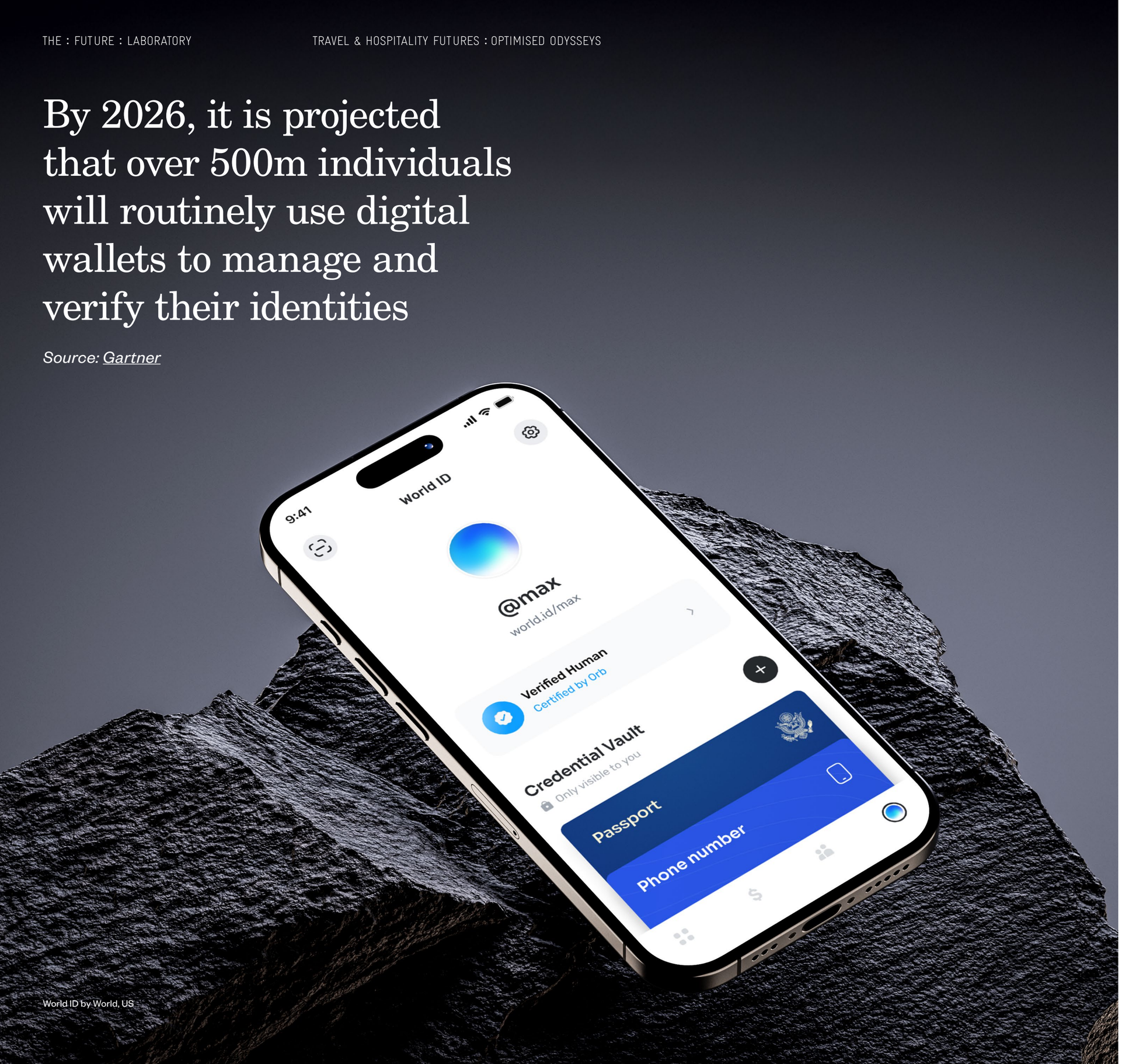
Source: Travel and Tour World



Left and right: As spontaneity becomes the new luxury, the Faroe Islands' self-navigating cars invite travellers to surrender control, discovering under-the-radar sites revealed only en route, Faroe Islands

By 2026, it is projected that over 500m individuals will routinely use digital wallets to manage and verify their identities

Source: Gartner



World ID by World, US

Cloud Citizens

Technologies such as blockchain-powered digital identities, combined with mass migration and mutable lifestyles, are rapidly transforming travel and giving rise to the 'Cloud Citizen'. These ae agile, mobile individuals with fluid identities who transcend traditional fixed-location living and bleisure travel.

Biometric digital identities and cryptocurrencies are revolutionising seamless global movement. Digital nomadism is accelerating, with 18.1m Americans identifying as digital nomads in 2024, a staggering 147% increase since 2019 (source: MBO Partners).

The World Migration Report confirms global mobility is not only recovering but surpassing pre-pandemic levels despite ongoing geopolitical complexities, signalling a clear shift toward more itinerant lifestyles.

Worldcoin is a global digital currency project by OpenAI CEO Sam Altman, which uses biometric data to create secure, unique digital IDs for seamless, borderless access. At the same time, regulatory frameworks are evolving. The European Union is strengthening digital protections and mobility infrastructure, while the UK government provides tools for citizens to securely manage digital identities across physical and virtual spaces (source: GOV.UK).

By 2026, over 500m individuals will routinely use digital wallets for identity verification (source: Gartner). Bhutan's nationwide crypto-based tourism payments exemplify this shift, enabling visitors to pay for everything from flights to street vendors using cryptocurrency.

Bholan also highlights quantum cryptography as a transformative advancement anticipated within the next 10 to 15 years, driven by increasing demands for enhanced security.

For travel operators, this future demands proactive adaptation. Traditional passport and visa systems face unprecedented pressure and risk obsolescence. As biometric data and digital identities become ubiquitous, securing privacy and data integrity will be paramount. The Cloud Citizen will expect frictionless, multi-currency and crypto-native payment options, tokenised loyalty and NFT-enabled bookings.



Desert Dreams
Epicon, an otherworldly luxury hotel and resort, is expected to open on the coastline of Saudi Arabia's NEOM development, Saudi Arabia

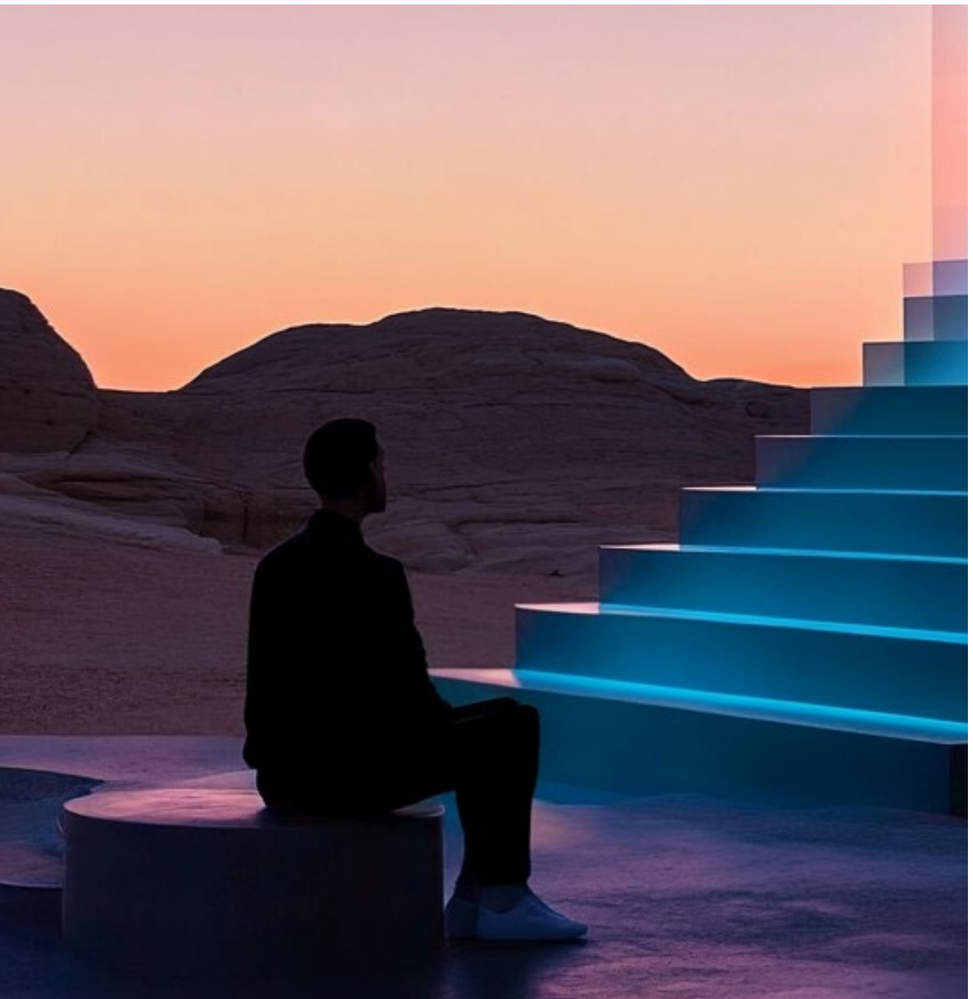
The Travelverse 2035

By 2035, travel will transcend the physical–digital divide, giving rise to immersive, hybrid realities, something we call the Travelverse. Still in its infancy, this emerging realm will be powered by spatial computing, AI, digital twins and sensory tech, pushing the boundaries of escapism to deliver journeys that are as mind bending as they are world bending.

Saudi Arabia's Qiddiya mega-destination, featuring AR-guided trails, digital twin technology and interactive light shows, is blurring the boundaries between physical infrastructure and digital augmentation. Imerza is a US-based leader in digital twin and immersive visualisation. Its co-founder and chief technology officer Dorian Vee explains to The Future Laboratory that gamification and AR are core to this immersive, story-rich destination, stating: 'People are seriously considering AR as part of the retail experience.'

These developments reflect profound traveller demand, as 81% of customers prefer companies that offer a personalised experience (source: Forbes). The Travelverse represents the next frontier where technology amplifies human curiosity and purpose through integrated, sensory-rich, hybrid realities.

As outlined in LS:N Global's The Synthocene Era: Merging Human and Machine Intelligence macrotrend report, 2035 will see the emergence of a Metamorphosed Intelligence – an intelligent, adaptive digital layer guided by AI and spatial technologies that fosters learning, growth and emotional depth.





Left: AI imagery by The Future Laboratory, UK; Above: Prince Mohammed Bin Salman Stadium by Populous, Saudi Arabia

Apple and Dassault Systèmes, alongside Infinite Reality and Google Cloud, are advancing digital twins and AI-driven immersive experiences. These partnerships showcase travel's evolution towards hybrid realities, enabling virtual property tours and personalised, interactive guest engagement.

When applied to the travel industry, hotels, resorts and cultural destinations will evolve into interactive environments. Visitors won't just see a place, they'll engage with contextual, layered narratives designed to deepen understanding and connection. From ancient cities enhanced with AR mythologies to regenerative eco-stays that adjust to optimise wellbeing, journeys will become dynamic and layered.

In the far future, hospitality spaces could evolve into adaptive environments: hotels that respond to biometric cues, mood or energy levels; itineraries shaped by real-time emotional data; and experiences personalised to a traveller's interests, history or purpose.

Strategic Implications

As tomorrow's travellers seek meaning beyond movement, people's shifting values and a changing climate demand that hospitality blends emotional intelligence with AI-driven personalisation to deliver joy and regenerative impact across every touchpoint.



Eastpak Resist'r Case, Belgium

Strategic Actions

AI Mood Matchmaker

Harness predictive AI and invisible tech to design emotionally intelligent, hyper-personalised journeys that respond to travellers' emotions, context and life stage.



Pursuit of Feeling by Black Tomato, Greenland

Engineer Serendipity, Not Just Systems

Design transcendent experiences, sensory souljourns, unexpected rituals and analogue touchpoints to reawaken joy through deeply human moments.



AI imagery by The Future Laboratory, UK

Temporary Belonging

Tap into the cultural gravity of global events by creating ephemeral travel spaces that reflect the event's theme, offering once-in-a-lifetime moments that unite emotionally connected, transient communities.



THE SKATEROOM exhibition at Hôtel de Crillon during Paris Olympics 2024, France

Thought-starters

Identity-as-service

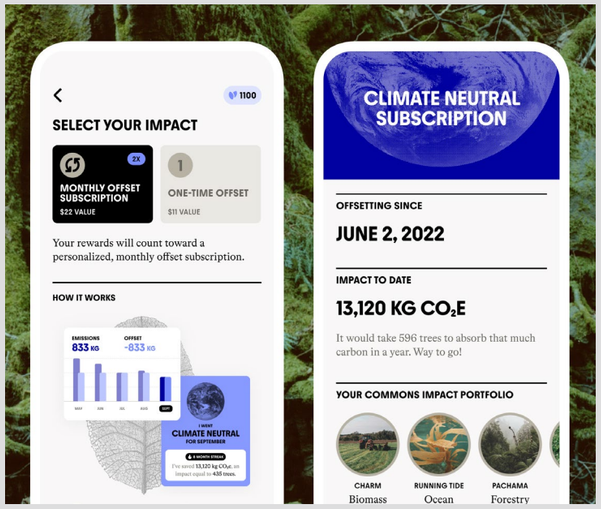
As digital IDs, biometrics and crypto-access evolve, identity could become the ultimate passport, enabling seamless journeys. Brands must rethink mobility, trust and access in a world without borders.



The Orb by World, US

Designing for Decarbonisation

Carbon impact is now a core design principle; brands must embed real-time, intuitive and visible sustainable choices into every touchpoint.



Commons, US

Curate for Travel Tribes, Not Demographics

Generational labels are giving way to affinity-based communities. Create offerings for micro-cultures and subculture stackers increasingly at ease with multiple identities, from sober-curious Gen Z to midlife solo explorers.



Timeleft, France

Related Macrotrends

2024

Luxury States: New Codes of Luxury 2024–2025

In a post-Covid landscape, changing consumer needs are driving retailers to rethink bricks-and-mortar stores to be more engaging, sensorial and memorable.



New Frontiers by Neiman Marcus. Photography by Arnaud Lajeunie, US

2024

Game-Changers: The Future of Sports Fandom

Innovative retailers are using technology to create intelligent, empathetic commerce journeys – where every touchpoint is a learning opportunity, and artificial intelligence caters for customers' idiosyncratic needs at scale.



adidas, Germany

2024

Functional Feasting

With hybrid working becoming the new normal, global retail footfall in decline and the loss of third spaces, the home is shifting from a fundamental comfort and security shelter to a dynamic commercial hub bubbling with retail innovations.



Single & Fat, US

2025

New Codes of Value

In this new era of scarcity, richness is expressed through rituals, and abundance is found in regenerative pursuits and deeper connections. New codes of value are emerging around connection, care and human flourishing.



Wise branding by Ragged Edge, UK

Strategic Worksheets

This strategic worksheet is to help you apply this macrotrend to your business



The Louis by Louis Vuitton, Shanghai, China

Prioritisation

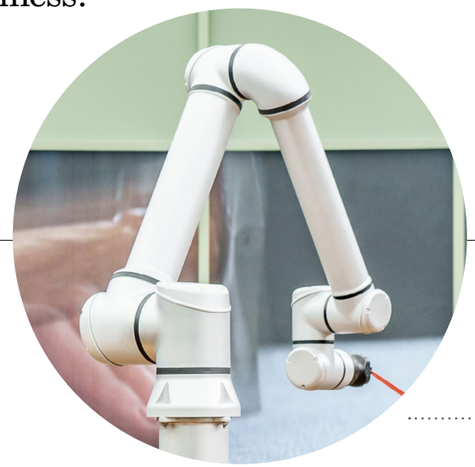
Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

Micro-globalisation | Fragmenting Societies | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Urbanising World



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

Select two insights that feel most relevant to your brand/business:

How do these insights align with your brand's trajectory?

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



Consider how this macrotrend could affect the following pillars of your brand:





01 Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add value to culture?

What will our consumers pay more for in the future?

02 Category

What's our greatest opportunity?

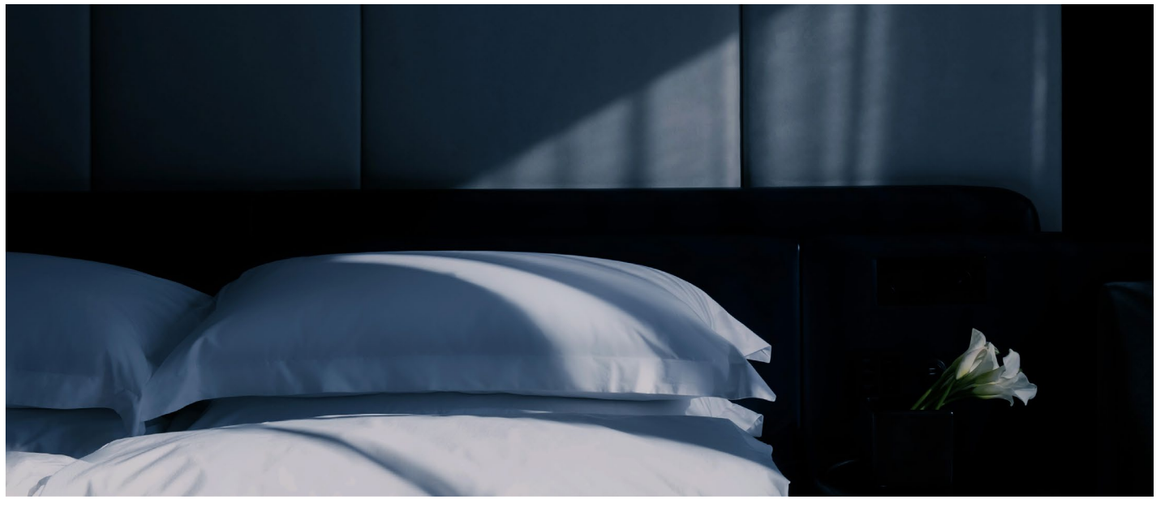
How is the competition evolving?

How can we differentiate?

From left to right: Ikea coffee shop pop-up by Lab 54, UK; adidas 8428 Melrose Avenue, US

Consider how this macrotrend could affect the following pillars of your brand:





03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

From left to right: Summer of Chaos by Db, Norway;

Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 3

In three years, how will this macrotrend change the brand?

YEAR 5

In five years, how will this macrotrend change the business?

This report is based on the sector research from The Future Laboratory's trends intelligence platform, **LS:N Global**

Read our latest macrotrend reports:



Staging Modernity by Formafantasma for Cassina at Milan Design Week 2025, Italy

Culture-coded Retail

Digital commerce may offer consumers convenience, but a new generation of in-person retail experiences energised by cultural relevance and built on brand community is luring them back into the store.



Gaia Communication System by Inxects, Denmark

Innovation Debrief 2025-2026

With eyes on 2025–2026, our annual report delves into 50 signals emerging from the margins.



Fluz. Identity by Koto, US

New Codes of Value

In this new era of scarcity, richness is expressed through rituals, and abundance is found in regenerative pursuits and deeper connections. New codes of value are emerging around connection, care and human flourishing.

We can also deliver our macrotrends to your business in a number of ways, from on-demand video presentations to strategic workshops and bespoke reports.

If you want to find out more, say

hello@thefuturelaboratory.com

Co-founder and chief creative officer : Chris Sanderson
Co-founder and editor-in-chief : Martin Raymond

Director of foresight : Fiona Harkin
Deputy foresight editor : Dan Hastings-Narayanin
Insights and engagement director: Olivia Houghton
Senior foresight analyst : Alice Crossley
Senior foresight analyst : Rose Coffey
Foresight analyst : Seyi Oduwole
Creative lead : Emily Rhodes

Director of strategic foresight : Alex Hawkins
Deputy strategic foresight editor : Darian Nugent
Presentations editor : Rhiannon Hudson

Design director : Samuel Davies
Creative director : Savannah Scott
Creative artworker : Harry Parker
Senior sub-editor : Ian Gill
Senior production planner : Maddie Watts

Director of marketing : Rodrigo Tobal
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Marketing Assistant: Ayesha Evans

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The Future Laboratory
6 Orsman Road, London N1 5RA, UK

Follow us
LinkedIn
TFL Instagram
LS:N Instagram

Get in touch
+44 20 7791 2020
office@thefuturelaboratory.com
hello@lsnglobal.com

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