

FUTURE TRAVELLER TRIBES 2030

UNDERSTANDING TOMORROW'S TRAVELLER



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FOREWORD

Understanding what customers really want is crucial to any successful business. But imagine if we could go a stage further; if as an industry we could discover what genuinely shapes travel experiences, or measure what travellers value most and in turn how their expectations could and should be better met.

At Amadeus, we have long been committed to understanding the traveller: from the original traveller-centric piece of research we conducted nearly a decade ago – our study *Future Traveller Tribes 2020* – through to the significant and on-going work we undertake as part of the Amadeus Traveller Trend Observatory, where we conduct and collect research from around the world on emerging traveller trends.

The reason we do this is that as we look to the next 10 to 15 years and beyond, arguably no group is better placed – or in fact more integral – to the continued evolution of our industry than travellers themselves. We are all travellers after all, and the inspiration constantly driving new exploration and adventure is what makes the travel industry so interesting, unique and ever-changing.

We commissioned Future Foundation to develop this study, *Future Traveller Tribes 2030: Understanding tomorrow's traveller*, which seeks to identify those different 'tribes' or different traveller segments that will shape the future of travel through to the end of the next decade. Importantly, Future Foundation have moved this beyond solely demographic-based segmentation, instead taking a rigorous psychographic

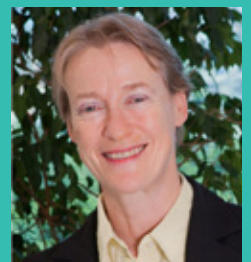
approach drawing on not just traditional labels but the personality traits, values, attitudes, interests and lifestyles of travellers, in the context of a truly globalised world. Rather than purporting to offer any kind of definitive view of the future, this report instead raises clear points for debate and discussion across the industry as we consider the next fifteen years.

Moreover in this study we are also actively seeking to understand and analyse how major parallel shifts in consumer demands, technology and society will culminate in new travel attitudes and behaviours.

At the same time, it is clear that within the increasingly complex and interconnected world of travel, a more sophisticated approach to merchandising and retailing is also required. But this is only possible when we know more about how travellers will behave in the future. Which is why in addition to this report, we have also commissioned a follow-up study that specifically explores how the industry can better match the needs of these new and specific emerging tribes, with a spotlight on airlines in particular, which will be launched later this year.

So whether, as this report identifies, your travel behaviour is influenced most by social media, ethical concerns, a desire for wellbeing, or reward and indulgence, let us all engage in debate, discourse and discussion as we consider how travellers will continue to drive transformation across our sector in the coming years.

Julia Sattel
Senior Vice President
Airline IT
Amadeus IT Group



EXECUTIVE SUMMARY

In 2007, Amadeus commissioned a future-focused report on key consumer groups travelling in the year 2020. Outlined there were four significant demographic segments, or “tribes”, which were understood to be of increasing importance to brands within the aviation and travel sectors.

This report brings those tribes into the present, and projects them forward into 2030 with a greater focus on the wider travel ecosystem including airports, hotels, rail companies and travel agents. Our approach however differs significantly from that brought to the 2007 report. Where the previous tribes were demographically-based, the tribes described here are based on the values, behaviours and needs of travellers. We see evidence for the existence of these tribes already; in this report we express our expectations for how the size and makeup of these groups will change over the next 15 years. We have not discarded the original four tribes, but we have rebuilt them into new frameworks.

We have developed the original four tribes into six:

Simplicity Searchers value above everything else ease and transparency in their travel planning and holidaymaking, and are willing to outsource their decision-making to trusted parties to avoid having to go through extensive research themselves.

Cultural Purists use their travel as an opportunity to immerse themselves in an unfamiliar culture, looking to break themselves entirely from their home lives and engage sincerely with a different way of living.

Social Capital Seekers understand that to be well-travelled is an enviable personal quality, and their choices are shaped by their desire to take maximal social reward from their travel. They will exploit the potential of digital media to enrich and inform their experiences, and structure their adventures always keeping in mind they’re being watched by online audiences.

Reward Hunters seek a return on the investment they make in their busy, high-achieving lives. Linked in part to the growing trend of wellness, including both physical and mental self-improvement they seek truly extraordinary, and often indulgent or luxurious ‘must have’ experiences.

Obligation Meeters have their travel choices restricted by the need to meet some bounded objective. Business travellers are the most significant micro-group of many that fall within this camp. Though they will arrange or improvise other activity around this purpose, their core needs and behaviours are mainly shaped by their need to be in a certain place, at a certain time, without fail.

Ethical Travellers allow their conscience, in some shape or form, to be their guide when organising and undertaking their travel. They may make concessions to environmental concerns, let their political ideals shape their choices, or have a heightened awareness of the ways in which their tourism spend contributes to economies and markets.

We do not present these tribes as mutually-exclusive and distinct silos into which consumer groups can be neatly placed, and we understand that consumers probably will identify with more than one group over time and depending on the situation or context. We have designed the tribes as provocative caricatures designed to inspire conversation amongst travel brands about how to best cater for tomorrow’s global traveller base.

We also, by way of an introduction, lay out the demographic, economic, consumer and technological drivers which will shape the growth or decline of the six tribes. These drivers are as follows:

THE DEMOGRAPHIC AND ECONOMIC LANDSCAPE

Changing populations. The next decades will see dramatic population growth in certain emerging nations. Even a slight increase in the proportion of 2030’s new mega-populations going abroad will have a dramatic impact on the number of people in the global travel system.

Rebalancing of global power. Strong fundamentals in emerging markets, combined with slowing growth and low fertility rates in developed economies mean that the maps of economic power, political influence, consumer spending, airline travel flows, cultural “hotpots”... will be redrawn.

Ageing societies. A growing proportion of populations in the upper age brackets will be a feature of many advanced economies

in 2030. This will put pressure on states, but also dislodge established stages of life, driving demand for more age-inclusive communications and devaluing age-based expectations for consumer behaviour.

Interculturalism. Future generations of immigrants and travellers will self-identify more fluidly, and will not have fixed ideas about the characteristics which define this or that national, ethnic or religious group.

THE CONSUMER LANDSCAPE

Work-life compounds. Flexi-time, zero-hours contracts, increased opportunities for self-employment, and a broad casualisation of business practices and arrangements have given more choice about when we travel for work. This is producing a hybrid form of travel – often referred to as “bleasure” – for which work takes on some of the features of play, and play some of the features of work.

Option shock. The unfathomable amount of information in the digital space is driving a market for engines and agents to condense and package choices into “bundles”, which make comparing options easier.

Enterprise networking. As social reaches deeper into the lives of billions of people, we will see online networking more thoroughly assert its professional importance. Consumers will invest more time and energy in building for themselves lucrative online brands, and reap new kinds of commercial returns on this investment.

Peer power. The breadth of expertise available from the networks of friends, family members and fellow consumer-citizens online have produced a revolution in our preferred advisory sources, and are fuelling an emergent peer economy.

Narrative data. Big Data will allow brands to tell ever more focused and compelling stories about our lives, personalising services not only efficiently, but imaginatively.

Pricing gets personal. Tariff-setting will not be excluded from the Big Data domain. Perfect Price Discrimination will allow travel brands to open up their offerings to new, less affluent emergent tourist groups.

Green responsibilities. Regardless of how climate science evolves, eco-ethical concerns will be a feature of the future consumer landscape. For many they will inspire micro-concessions to less wasteful or luxurious (travel) behaviours.

THE TECHNOLOGICAL LANDSCAPE

Connectivity, everywhere. Only the world's destitute will be unconnected in 2030, and for many of us the new normal will be 5G – with scale factors faster than anything we know today.

Polymath devices. Whatever form they take, the new generation of powerful consumer devices will mould themselves to any purpose. More radically, devices not significantly more advanced than those at today's leading edge will become affordable and accessible to billions, amplifying the amount of data open to commercial use and propelling new efficiencies.

Computers learn human. Many roles once filled by human workers will be staffed by search algorithms, robotic bellhops, cashless payment systems, virtual customer service avatars and fluid biometric processing systems.

Bodies of research. Future sensing technologies will get touchy-feely, as biometric facilities are built into airport security, payments and tracking systems. Implications for personalisation abound.

Remote control. Virtual Reality will be persuasive, and though it will not substitute straightforwardly for “the real thing” when it comes to travel, travel brands are invited to curate bounded virtual environments, “previews” which help consumers to understand their options and hedge against the risk of disappointment.

This report is the first of two commissioned by Amadeus this year looking at the traveller of 2030. The six tribes outlined here will be the basis for further analysis taking a closer look at how the travel industry can cater to the needs of the six tribes identified herein.

The second report will describe how brands can reinvigorate each stage of the journey by creating ‘purchasing experiences’, providing a personalised experience and aiming to surprise and delight the customer. As this report revives conversation around demographics, repositioning its relevance for 2030, the second report will revive conversation around merchandising and how the travel industry can prepare to specifically cater to the needs of the six tribes identified within this report.



INTRODUCTION

Much has changed since the time of the original Traveller Tribes report from 2007. In 2008, 80% of UK consumers agreed that all they want a phone to do is make calls and send texts.¹ Now, 80% of consumers worldwide own smartphones.² They have revolutionised how people access information, spend their time, and relate to their environments. They have brought GPS out of the car into the hand.

We have also seen a global financial crash shake the foundations of Western finance, the Arab Spring ignite new kinds of geopolitical unrest, and a spying controversy embroil governments and propel the concept of data privacy, what it prevents as well as what it defends, into the consciousness of billions. The social site Twitter has grown, since its launch in 2006, from a novelty to a pillar of global communication, with 288m regular users at the end of 2014, symptomatic of how online networking has cemented itself as an integral part of modern life.³

This report builds on the original predictions of the 2007 report, and accommodates these new developments, all the while looking fifteen years further ahead to 2030.

But some fundamentals have not changed. The travel industry has thrived, and we believe it will continue to thrive. Global recessions, security threats, oil price instability... these have not yet curbed its expansion. Travel sector growth consistently outpaces the world economy. Surviving all short-term disruptions is a desire on the part of the growing millions of people worldwide to explore and expand their reach, a desire which we believe is fundamental, universal and inalterable.

This is about the biggest generalisation that can be made about the travellers of tomorrow. Consumers have come to resist with increasing force brand efforts to silo them into demographic groups, and the increasing complexity of ways in which consumers self-identify has invalidated any attempts to do so. Some of the underlying presumptions in the fields of futurology and consumer insight have changed in response, and we have found it to be necessary to develop a new methodology and a different perspective in bringing the 2007 findings up to date.

After an extensive process of future-focused research and consultation with key industry figures, external experts in the fields of travel, tourism, technology and futurology, as well as – of course – ordinary travellers on the streets in dozens of global markets, we have designed six tribes based on clusters of values, needs and behaviours we are already seeing, and with which the travel industry will need to be engaging over the next 15 years and beyond. In illustrating them, we bring to bear Future Foundation's wealth of global consumer research, as well as economic, demographic and attitudinal forecasts reaching decades into the future.

They represent an expansion and evolution of the foundation tribes outlined in 2007, only this time, rather than describing key demographics, we have taken a “psychographic” approach, forming new sets of travellers on the basis of their broadly similar outlooks on, expectations of and objectives for their travel.

At the same time, we acknowledge that 1) these groups are not mutually-exclusive, but interlinked and overlapping, 2) that the consumer's position within them is context-bound and provisional, and 3) that very few consumers now or in 2030 will identify with all of the characteristics attributed to any one tribe exclusively or absolutely. It's just not that easy. With this proviso, we aim to show that collectively they make up a valuable framework for formulating future travel brand strategy.

This report is the first in a two-part commission this year from Amadeus. The second, also building on our tribes, will focus on purchasing behaviour. More information about the wider project can be found in the final section.

The traveller tribes are placed within the demographic, consumer and technological contexts that will shape the travel landscape up to 2030. These are broad structural factors: features of the global experience which individuals, nations, institutions and parties cannot on their own re-cast, and which will survive to a great extent intact any form of exigent change in political or economic circumstances over the next fifteen years. This is where we begin.



THE WORLD IN 2030: THE DEMOGRAPHIC AND ECONOMIC LANDSCAPE

By 2030, there will be an extra billion people in the world, of which 20% will be travelling. The population is forecast to reach 9.6bn by 2050 according to the United Nations.⁴ Boeing forecasts that there will be a 5% annual increase in passenger traffic from 2015. The global passenger and freighter fleet will double.⁵

These figures sound alarming, and have often been cited in popular media as the basis for apocalyptic stories of infinite human expansion, future world hunger, water scarcity, energy crisis, suffocating urbanization and constant warring.

The assumption that rapid population growth is in whatever way bad for humanity is up for debate, but even if we believe it to be so, there is strong evidence that far from hurtling towards the end of days, we may be approaching a population plateau which, when combined with improved standards of living, will create a prosperous and stable global market for travel.

Family planning, state welfare, increased affluence and resultant population decline are firmly established traits of developed markets (European numbers are forecast to shrink by 14% by 2050), but we are also seeing a rapid fall in fertility rates in large developing countries such as China, India, Indonesia, Iran, Brazil and South Africa. Only a small group of undeveloped countries at this point are keeping world population from steep decline.

This prosperous global market will however also be a profoundly changed market, as we explore below.

“The actual number of people on the planet is, to an important extent, incidental to the impact humans have on both the environment and each other... it's not how many of us there are but how we live that will matter most. There are many signs that we may well collectively be choosing more often to live sustainably, not least in how we are already controlling our numbers. ”

Danny Dorling, *Population 10 Billion* (London: Constable, 2013)

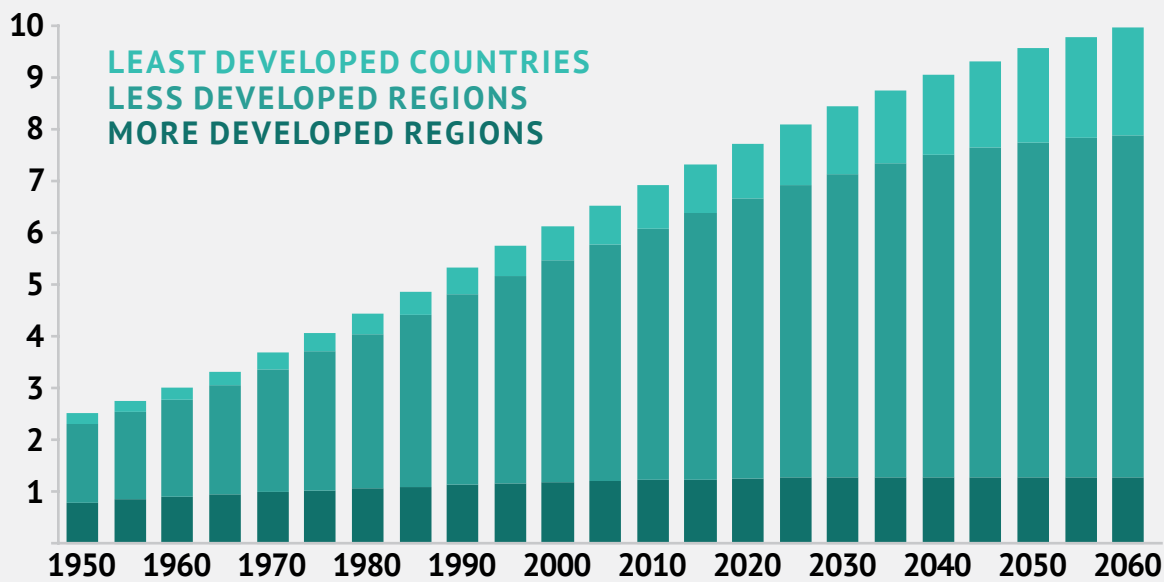
CHANGING POPULATIONS

Worldwide, fertility rates are beginning to decline, with the exception of certain increasingly urbanised mega-populations. For all the focus China has received, it is Africa which will experience the greatest percentage population change before 2030. Though these high birth-rate nations are generally the world's least affluent, even a slight increase in the proportion of 2030's mega-populations going abroad will have a dramatic impact on the number of people in the global travel system.

Travellers will come from a wider spread of nations. According to the UNWTO, Europe and North America will go from possessing over 60% of the global share of international tourism to under 50%, and Boeing puts the share of total air traffic carried by European and North American airlines at just 38% by 2033.⁶

New market entrants will be hungry for travel. Some will enter the market who, but one generation ago, may never have left their town or village. Their requirements cannot be fully anticipated. Airlines will be tested for their flexibility, and travel providers will be forced to diversify their messaging and offerings.

TOTAL POPULATION (BILLIONS) | UNITED NATIONS PROJECTIONS | 2014

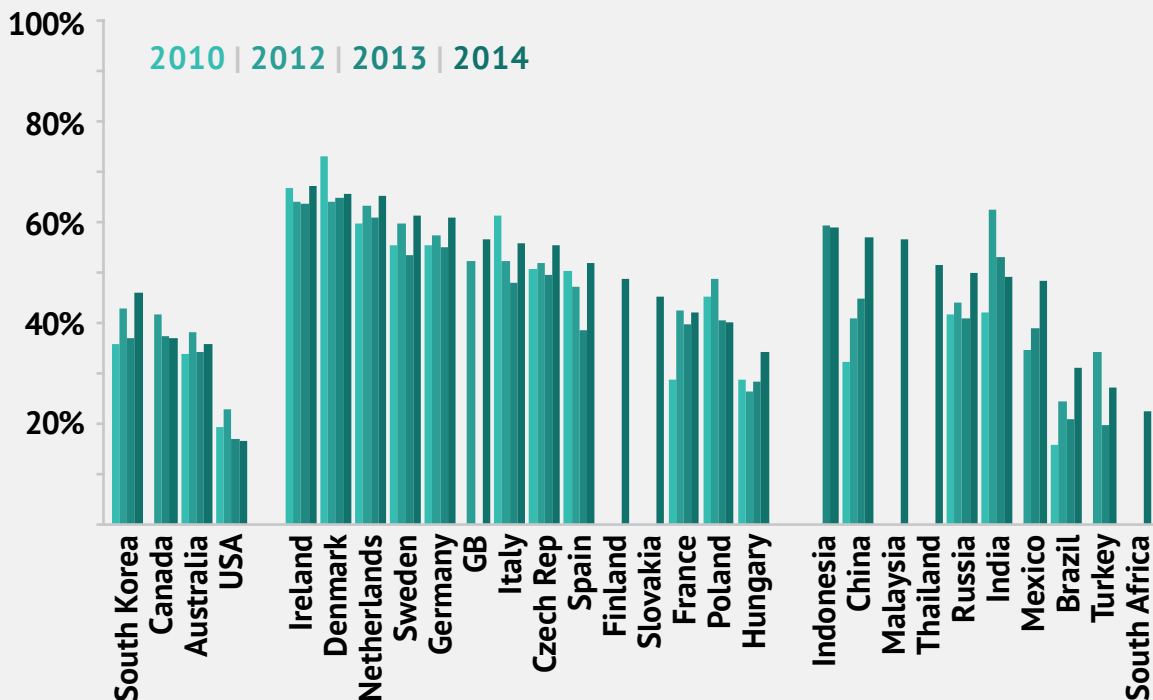


Source: United Nations, Department of Economic and Social Affairs, Population Division's World Population Prospects: The 2012 Revision/nVision, 2014

REBALANCING OF GLOBAL POWER

There is no doubt that the relative weights of today's advanced economies will diminish as the emerging market economies continue their catch-up in the coming years. The fastest growing markets will be APAC, LATAM and Africa. China will be the largest global economy, surpassing the US, by 2030. We can forecast double digit traffic growth for many emerging markets. This combined with slowing growth and low fertility rates in developed economies means that the maps of economic power, political influence, consumer spending, airline travel flows, and cultural "hotpots"... will be redrawn over the next 15 years.

"WHICH OF THESE BEST DESCRIBES HOW OFTEN YOU DO EACH OF THE FOLLOWING ACTIVITIES? HAVE A HOLIDAY ABROAD"
% WHO HAVE DONE THIS AT LEAST ONCE IN THE LAST 12 MONTHS | 2014



Source: United Nations, Department of Economic and Social Affairs, Population Division's World Population Prospects: The 2012 Revision/nVision, 2014

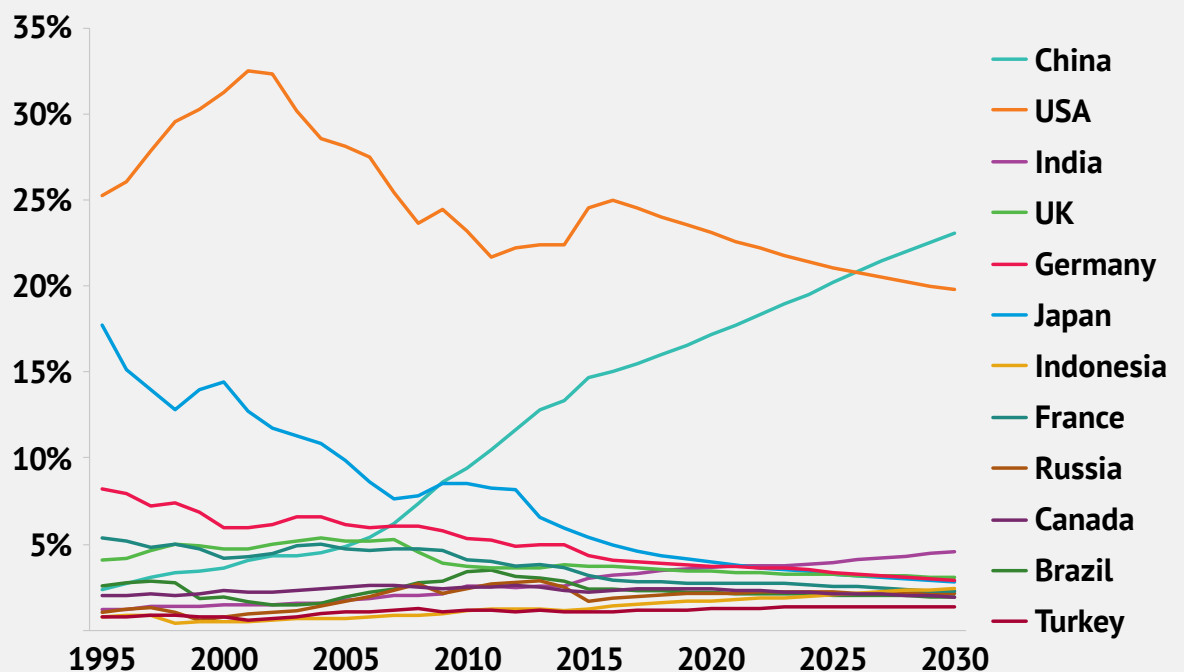
We are unlikely to see a neat "power-swap" from one central player or group of players to another in the coming years. Today's great powers – US, Germany, Japan and others – will remain influential players. However, and simply put, there will be more seats at the global high table in 2030.

The precise pace of change will be dependent on factors which are difficult to predict, such as capital rotation out of emerging markets, key elections, and the pace of macroeconomic reforms. It is widely accepted, however, that the global centre of economic gravity will change, and move toward the south-east.

These features include (to a greater or lesser extent in each region): favourable demographics (i.e. growing working-age populations); rapid urbanisation and consequent improvements in labour productivity (a result of people moving into more productive, knowledge-intensive urban industries as opposed to rural subsistence employment); greater foreign direct investment; and, crucially, rapidly expanding middle classes that will stimulate domestic demand.

We therefore were convinced to approach our study of impactful future travel groups with the fact of there being many more and much richer Asian, Latin American and (to a lesser extent) African tourists in the travel ecosystem in 2030 firmly in mind.

REBALANCING GLOBAL POWER: SHARE OF GLOBAL GDP (NOMINAL IN US\$) TO 2030



Source: Oxford Economics/nVision | Base: July 2012-based forecast

AGEING SOCIETIES

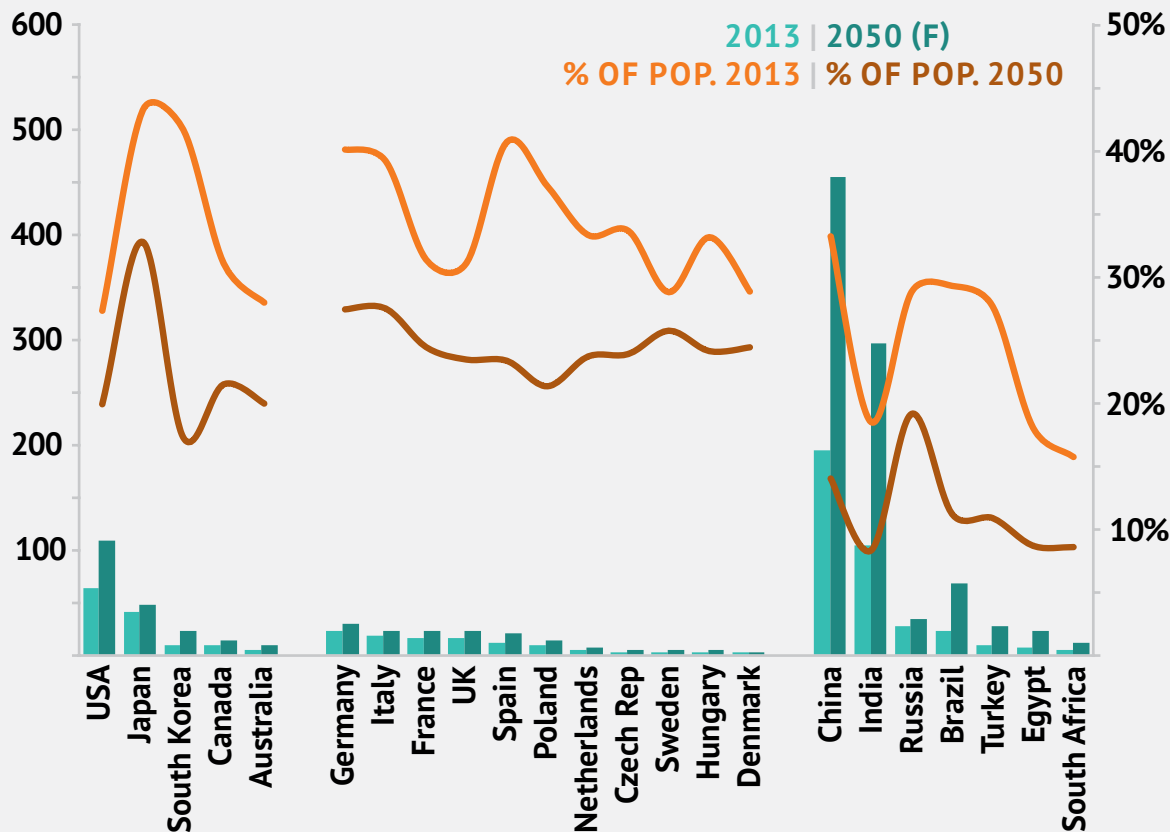
The population story is not just one of growth, but demographic redistribution. Ageing populations will characterise many advanced nations worldwide. By 2030, the median age of the global population will rise from 29.6 to 33.2 years.⁷ Life expectancies will gradually inflate. Better medical treatment for many will improve life expectancy and medical technologies will extend the upper bounds of life, all the while compressing morbidity. In other words – people will live longer, but also spend a greater proportion of their life in good health. This will put increased strains on economies, and bring significant social change.

Again, the instinct is to prophesise doom, but this change will mean far more equal societies than before. The ageing population will also be more ageless than they have been – more comfortable with technology, more healthy and of course more mobile than the baby-boomers we know.

Global diversity of cultural attitudes towards ageing should not be underestimated. The veneration of elders however is no longer a feature of many societies. It has not necessarily been replaced by the veneration of youth. It has been replaced by the veneration of the independent self, and many older people will live, and travel, alone.

At the same time, millennials will feel an easing off of pressure to conform to traditional life narratives, putting off responsibilities like leaving the family home, home ownership and starting a family until they are much older. For many in developed markets, the 20s will be playground years of irresponsibility, self-experimentation and, of course, travel. It will be more difficult to affiliate any “typical” travel behaviour with a particular age demographic.

TOTAL NUMBER OF PEOPLE AGED 60+ (MILLIONS) AND % OF THE TOTAL POPULATION | UNITED NATIONS PROJECTIONS | 2013



Source: United Nations, Department of Economic and Social Affairs, Population Division's World Population Prospects: The 2012 Revision/nVision, 2013

INTERCULTURALISM

“ The Chinese tourist is currently very consumer-oriented. Their priorities however will change, most likely along the lines of how developed market travellers have changed in very recent years. Community becomes more important, “giving back” becomes more important, and less materialistic and conspicuous forms of consumption come to be preferred. ”

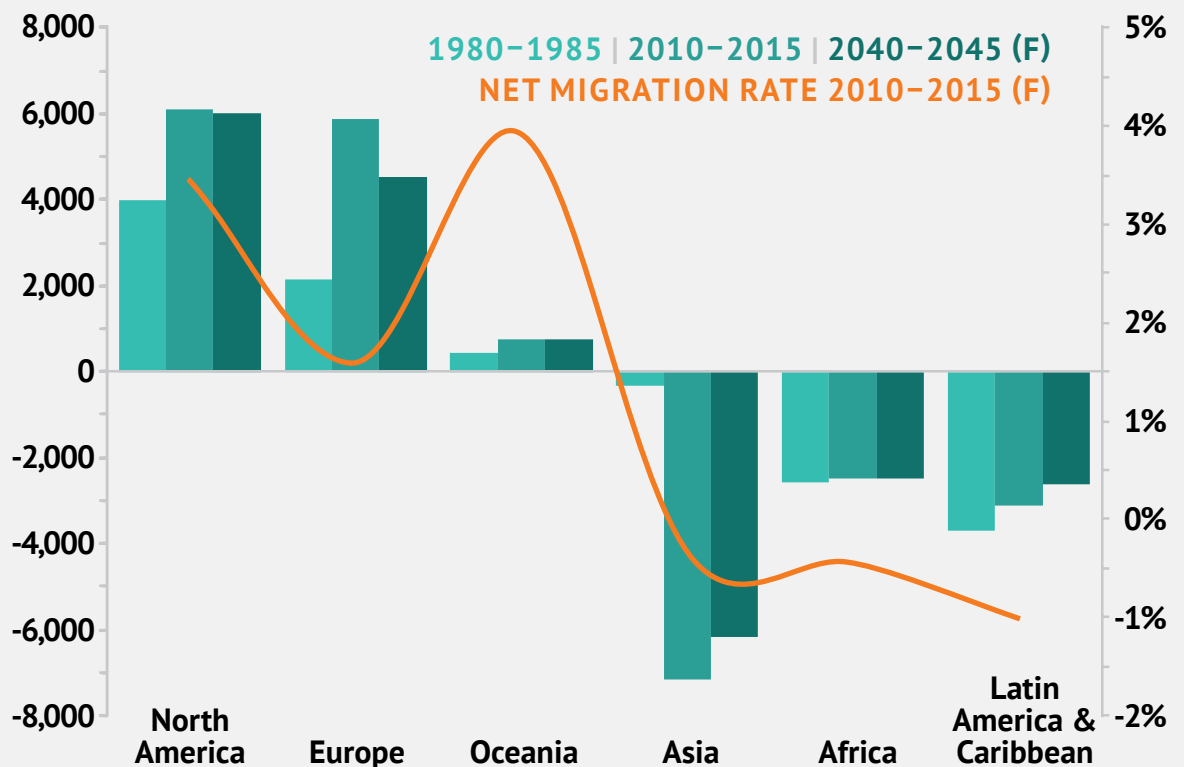
Ian Yeoman, Travel and Tourism Futurologist

At the same time, the age of multiculturalism gives way to the age of interculturalism. To varying degrees worldwide, different ethnic communities will intermingle more closely and different cultures cross-fertilise. Future generations of immigrants and travellers will self-identify more fluidly, and will not have fixed ideas about the characteristics which define this or that national, ethnic or religious group.

This will be particularly impactful on developed economies. Net migration from emerging to developed markets will be a defining trait of the future global population flow. This is further cause to suspect population decline – the flow of migrants from high-fertility to low-fertility countries generally results in lower fertility rates overall.

It should also prompt us to begin to think about the millions of genuinely “multi-located” people in 2030 – those dual-citizens, temporary visa-holders, overseas students, globetrotting entrepreneurs, managers of overseas assets like holiday-home owners – and how their resultant travel obligations will affect the global market.

NET NUMBER OF MIGRANTS (1,000S) AND THE NET MIGRATION RATE UNITED NATIONS PROJECTIONS | 2013



Source: United Nations, Department of Economic and Social Affairs, Population Division's World Population Prospects: The 2012 Revision/nVision, 2013

Globalisation and mass networking are enhancing our global awareness and understanding, and our world feels increasingly small. Though it is hard to imagine an entirely open and transparent world in 2030, nations are being brought onto the international stage – and onto the tourist market – which as many as a few decades ago were dark spots on the (Westerner's) world map.

Although the quantum leaps of commercial sub-orbital and supersonic travel will be very unlikely within the next 15 years, planes will get faster, making regular trips more desirable and long-distance travel more practical. The death of minority languages, the increasing dominance of a certain lingua francas, and – more radically – the ever-growing power of portable real-time translation software are helping the world to speak the same language.

The (perceived) homogenisation of global cultures presents both challenges and opportunities for the travel industry. It opens up new markets and encourages wider travel, but it also threatens some of the most fundamental reasons why travel can be so appealing.



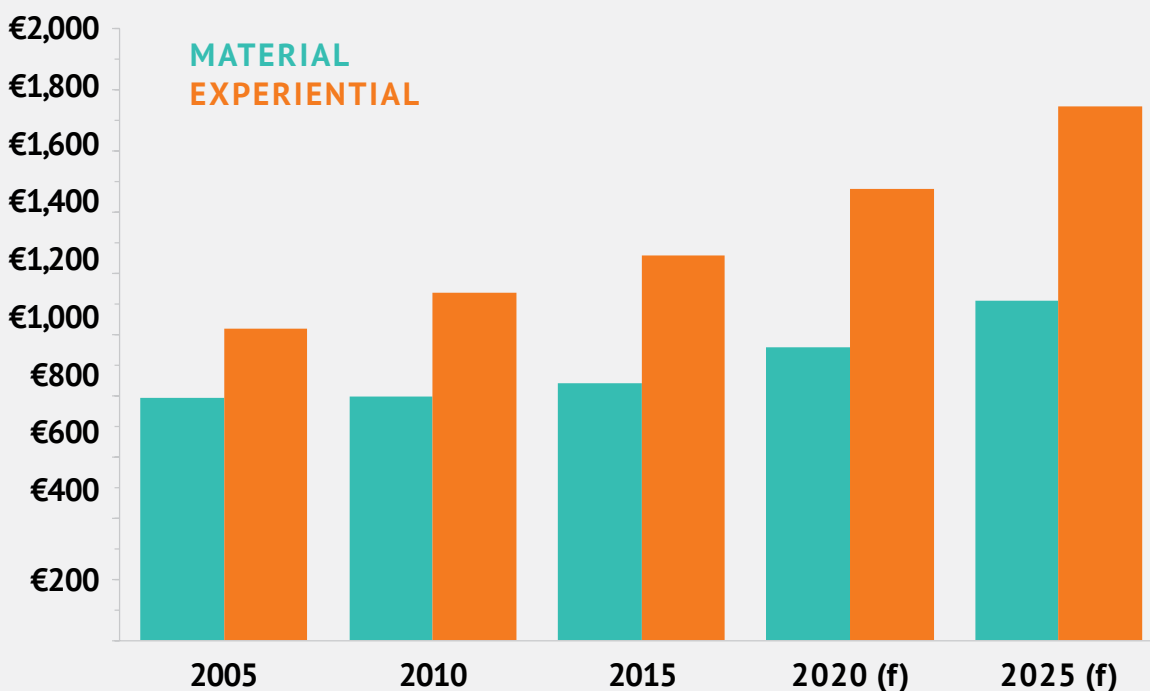
THE WORLD IN 2030: THE CONSUMER LANDSCAPE

As wealth gradually expands and education levels rise, so consumer-citizens across continents find basic needs ever more easily met. Today, the World Bank classifies 1bn people as “destitute”, and a proportion of the world will still live in conditions of severe poverty in 2030. For increasing millions though, basic material needs will be well-catered for.

And so the search for the exceptional grows: tastier and more varied cuisine, more elegant fashions, richer expectations for one’s children and, naturally, more travel. Technology has its say in this narrative too; the Experience Economy is particularly vibrant when travel exploits are endlessly traded on social networks.

“Wellbeing” for many will be defined more in experiential and less in material terms. Middle-classes will colonise societies and cultures, reading aloud a manifesto for: more opportunity for self-improvement and education; more global stability and an end to war; more ecologically responsible brands; more adventure and soulfulness (and less barefaced corporatism) in the world; more profound encounters with people and places; more brand conversation with me as an individual.

TOTAL ANNUAL EXPENDITURE ON ENRICHMENT VS. MATERIAL GOODS
(IN BILLIONS OF EUROS, AT CURRENT PRICES | JANUARY 2015 FORECAST)



Source: Oxford Economics/nVision, January 2015

WORK-LIFE COMPOUNDS

“Work-life balance”, the weighing in each hand of two fundamentally separate areas of life, is quickly becoming an anachronism. Though acute time-pressure is still, and perhaps increasingly, felt, many also feel that their work schedules are generally more accommodating than they have been. Flexi-time, zero-hours contracts, increased opportunities for self-employment, and a broad casualisation of global business practices and arrangements have given us more choice about when we travel for work. “Seasonal”, “necessary” and “occupational” travel, as categories, come under question.

The contexts for business travel as a product category are changing. No longer does a typical business trip for an executive of a global company look like a direct trip from London to New York headquarters. Many future workers will be free to explore opportunities worldwide, will be untethered from offices, and will understand that flexibility and opportunism are imperative for success. Many will take more flights for business purposes, but improvise leisure around their commitments. They will be unable to plan too far ahead.

Many also increasingly see travel as an opportunity to develop their education, work experience and skill-sets. building personally enriching activities into their free time. This multipurpose, hybrid form of travel – often referred to as “bleasure” – has work take on some of the features of play, and play some of the features of work.

Also; more women are exploiting these trends in the business climate to carve out careers around their family lives. We will see a higher proportion of female travellers, bringing with them different preferences and behaviours at every stage from research and booking to the end of the trip and beyond.

OPTION SHOCK

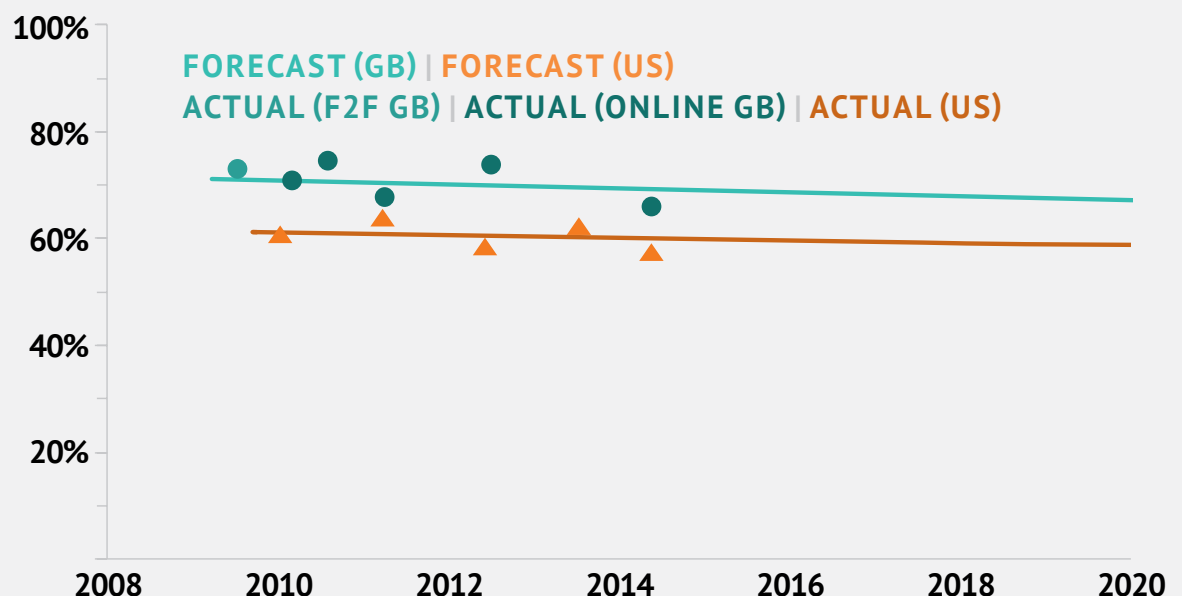
“As of today a new book is published every 30 seconds. Over half a billion scientific engineering professional abstracts are published every year. 50% of everything a medical student is taught is wrong by the time she qualifies. Most Google searches produce at least tens of millions of results. No one can cope with this.”

Peter Cochrane, Futurist and Entrepreneur

There will be more choice for consumers than ever. A swathe of new applications will transform the way in which we search for information, understand options and get educated to make good choices. The most advanced and ambitious future technologies will do much the same work as traditional travel-agents – qualifying choice based on our preferences - only these preferences will not necessarily need to be prompted or consciously expressed, and they will be able to manage inputs of vastly greater complexity than any system we can imagine today.

On the human concierge side, an entirely new class of professionals may emerge to help us repackage the dazzling array of choice out there into more comprehensible “bundles” of choices. Part data scientist, part lifestyle guru, they will encapsulate a broader repositioning of agency action in the travel sector, the main role of which will shift from providing information to offering personalised guidance.

“I SHOP AROUND EXTENSIVELY FOR THE BEST DEALS” | % WHO AGREE OR AGREE STRONGLY | SEPTEMBER 2014 NVISION FORECAST



Source: Future Foundation/nVision Research | Base: 3000 - 5000 online respondents aged 16+, Global 2014

These technologies will tastefully mediate between our desire for a sense of control over our decision-making, and the fact that the amount of choice available is naturally overwhelming.

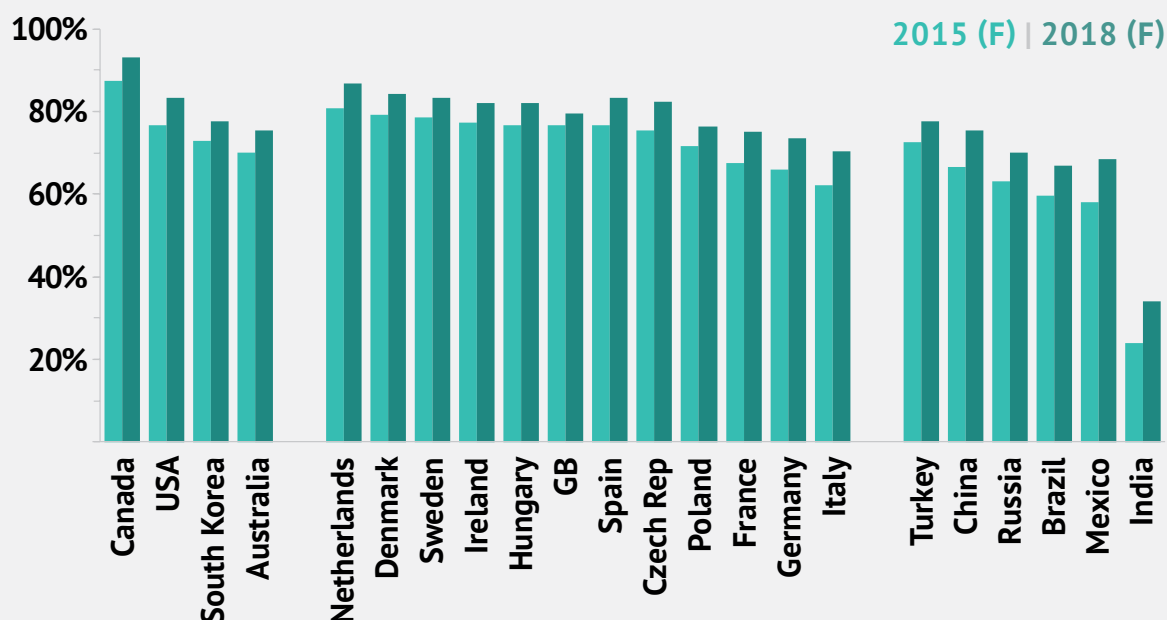
At the same time, we will be able to make decisions based on more nuanced and unusual preferences. We will be able to make or outsource searches based on more sophisticated grounds than those we see today. “Open question search” and “Exploratory search” will help us get closer to expressing intentions which are too complex to express concisely or are beyond words entirely. Algorithms will steer us based on what we have seen, what we have encountered, how we have felt... and indeed a powerful combination of all of these.

This revolution in info-retrieval might look like a Google-bar, but smarter, or might more closely resemble an “Artificial Intelligence”. However it may work, it will help us collapse the divide between the holidays inside our heads and those recorded in our Facebook albums.

ENTERPRISE NETWORKING

Human friendship now means the continuous distribution of news, serious and trivial. Failing to keep track means alienation, and non-presence on social media is an increasingly costly eccentricity. As the proportion of social media users approaches the saturation point at between 80 and 90% worldwide in 2030, these will be the terms on which all vast majorities will connect.⁸ It is difficult to say which sites specifically networkers will be using, or how diverse the ecosystem will be. What we can say is that networking will find a relevance beyond the way we socialise, and reach out further into other areas of our lives.

% WHO USE SOCIAL NETWORKING SITES IN THE LAST SIX MONTHS
JULY 2014 NVISION FORECAST



Source: Pew/nVision Research | Base: all individuals aged 16-64 (Mexico 16-54), 2014

Many will still use online networking platforms for familiar reasons – as a convenient tool for keeping in touch, because of a compulsion to share, because everyone else does – but we will also see the rise of a group who will understand what networking can do for their commercial lives.

A generation of networkers will take their cues from today’s enterprising YouTube personalities, leveraging their online followings, personal data and portfolios of interesting content and abilities to talk to brands to extract discounts, VIP treatment and even direct monetary reward from online sellers.

The Tweet will establish itself firmly as a de facto global currency by 2030. Readily quantifiable online social capital (like a “Klout” score, but infinitely more detailed and more widely-adopted) will be measured to assess candidates for jobs, personalise pricing, screen potential partners and, critics will argue, create a new global caste system. Most will use their online network-building to supplement their incomes; some will have no income aside from what they can do online for themselves, and/or for paying clients.

The desire for occasionally anonymous interactions must, broadly, take a back seat to our ambition to create from ourselves a lucrative online brand.

PEER POWER

The quantity of direction now available online from the networks of friends, family members and fellow consumer-citizens has produced a revolution in our preferred advisory sources. Institutional and professional authorities will exist in opposition to, but also in collaboration with, a new class of hyperlocal heroes and bedroom blogging luminaries.

Review sites such as TripAdvisor will pass through their growing pains to become highly professionalised and reliable hubs of information, employing systems of moderators and peer-referees. As networks become more hostile to anonymity and social networking sites (such as Google+) increasingly ask us to collect our various online and offline selves into a coherent - and accountable - digital personality, fraud on these sites will decrease and reviews will gain further credibility.

If one site rises to the surface, it may be that by 2030 consumers will have at their disposal something like a comprehensive directory of all global attractions, hotels, enterprises etc. This could produce a distorting effect in terms of visitor patterns, installing new “hotspots”, perhaps even new iconic tourist destinations, into the global cultural mainframe. More radically, destinations, even whole regions or cultures, could be designed or redesigned to appeal to the TripAdvisor user base.

This driver also takes in the growing peer/sharing economy, which will allow a certain minority of consumers to opt-out of the travel ecosystem almost entirely, or mix traditional and non-traditional forms of accommodation, leisure and transport over the course of a break.

NARRATIVE DATA

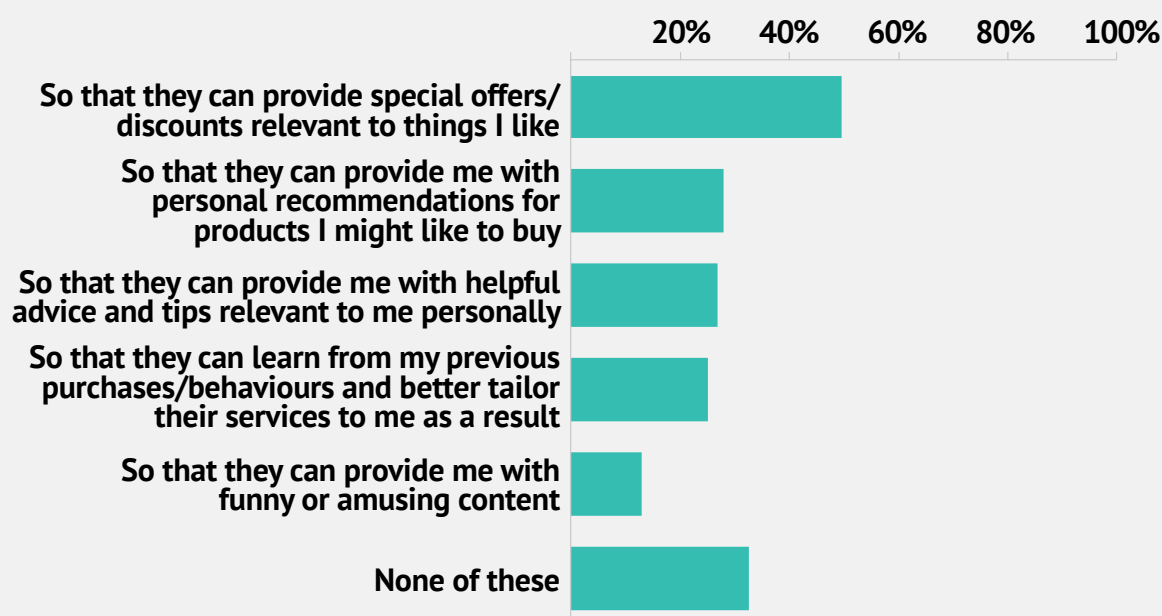
Big data has lowered the costs of collecting customer-level information, making it easier for travel providers to carve out new customer segments and target those segments with customised messaging, personalised services and, perhaps, differential pricing. These services will enhance every stage of the consumer journey.

Data will be processed not merely on the basis of expressed or inferred travel preferences, but data taken from all areas of our personal, professional and consumer lives. Our ebook choices, levels of physical activity, TV-viewing histories... will all enter the info-mix out of which smart algorithms pull not only efficient but creative recommendations for what we do with our holiday time, to proactively make preparations based on individual needs, and make services slicker and more fulfilling.

The benefits of an open data economy for the brand (and customer) mean that some form of B2B data sharing will be a feature of corporate best practice in the future. Even if it is not, data science will have advanced to such a degree that from even the smallest and roughest inputs we will be able to intuit powerfully telepathic insights into the motivations and preferences of customers.

This will produce a “Market of One”, in which the feeling of being targeted on the basis of membership to some imagined demographic or other collective, of being treated as anything less than an individual, will attract serious ill-favour from consumers.

“FOR WHICH, IF ANY, OF THE FOLLOWING REASONS WOULD YOU BE HAPPY TO GIVE PERMISSION TO A COMPANY TO USE YOUR PERSONAL DATA?” | % WHO WOULD GIVE PERMISSION TO COMPANIES FOR EACH OF THE BELOW REASONS | GLOBAL AVERAGE | 2014 SEPTEMBER



Source: nVision Research | Base: Mean of 8 countries, 1000 online respondents per country aged 16-64 (Brazil, Italy, Spain 16-54 / China, India 16-44), 2014 September

PRICING GETS PERSONAL

Differential pricing, known to economists as “price discrimination”, is the practice of charging different prices for the same product to different customers along the demand curve. Instinctively this may sound unfair, but many forms of personalised pricing already exist and produce few objections. Concessions for particular demographics, like students and the elderly, are commonplace. Loyalty often commands lower prices, and even advanced technological concerns incorporate barter and negotiation into the sales models. The aim is for the brand to achieve across a consumer base “perfect price discrimination”, raising prices for those willing to pay more without losing another group of more price-sensitive buyers.

Airline, and to a lesser extent hotel, ticket sales already incorporate many kinds of differential pricing. The aviation sector will be pathbreakers in this area, and rail and hotel companies can be expected to innovate too. Airline prices already vary according to how much flexibility and price-sensitivity customers demonstrate. Booking at the last minute incurs high prices, and investing time in the use of price-comparison services is rewarded generally with lower prices.

In the Big Data era, Perfect Price Discrimination as a pricing practice, rather than merely an economic hypothesis, becomes supercharged with possibility. Collecting data through cookies online would allow brands to tailor prices according to browsing behaviour, for example reducing prices for those evidently willingly to compare quotes from multiple sites.

With more creative application of data, prices could be matched based on location of IP address, purchase and travel history, level of social media influence, willingness to consent to data sharing, likelihood of lodging complaints, etc. – anything which helps brands better understand willingness to pay, and capture the loyalty of travellers who may have something to offer the brand from a media perspective.

Bearing this in mind, differential pricing could be a necessary tool in expanding the market to allow millions of travellers from emerging economies to fly for the first time at a price accommodating their generally low personal spending power – for example, while China is currently the second largest economy in the world in terms of economic productivity, its GDP per capita is some 4-5 times smaller than that of the US, so its travellers may have less disposable income to spend on travel.

Differential pricing could help travel providers access new customers by offering them a price which reflects their spending power.

“ Economics suggests that many forms of differential pricing [...] can be good for both businesses and consumers. However, the combination of differential pricing and big data raises concerns that some customers can be made worse off, and have very little knowledge why. [...] While substantive concerns about differential pricing in the age of big data remain, many of them can be addressed by enforcing existing antidiscrimination, privacy and consumer protection laws. In addition, providing consumers with increased transparency into how companies use and trade their data would promote more competition and better informed consumer choice. ”

Executive Office of the President of the United States,
Big Data and Differential Pricing, February 2015

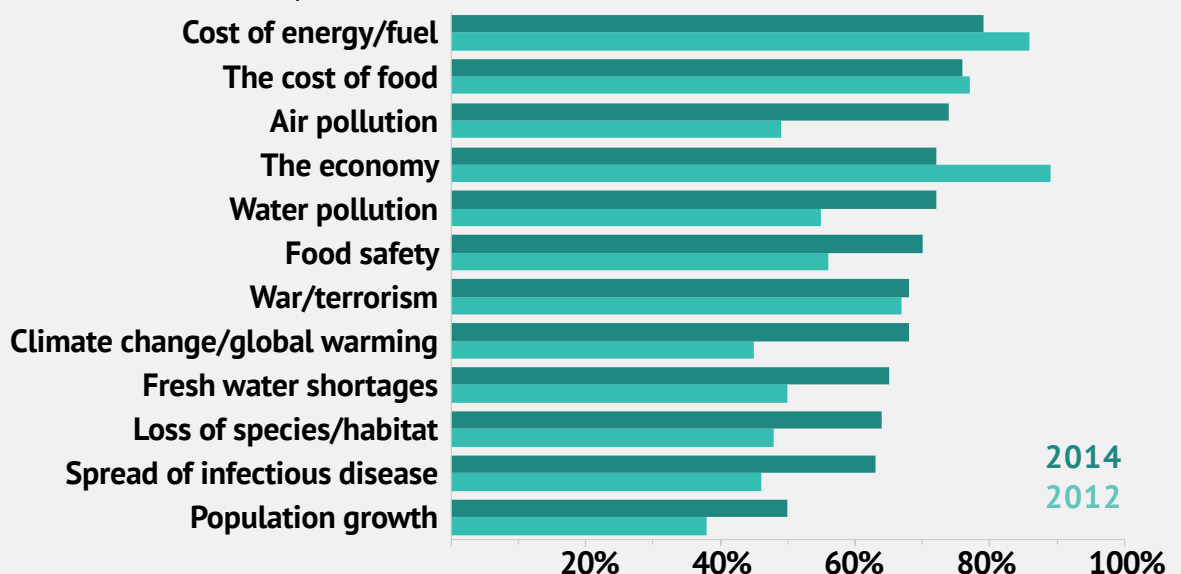
Despite this list of benefits, few brands have implemented such ideas, and PPD in practice is largely untried and untested today. Differential pricing often raises concerns about discrimination, competition and consumer privacy. The current data economy is largely opaque, the issues at play are little understood by consumers, and the general perception is that brands benefit more than consumers in data exchanges which are often coerced or clandestine.

New consumer protection legislation is suggesting strong property rights for consumers, which could impact the development of some applications of Big Data. Alongside the necessary and important protection of consumer interests, technology and business practices in this area are growing and there will surely have been significant innovation by 2030.

GREEN RESPONSIBILITIES

There is no space here for discussion about the state of climate science and the changing global energy environment. As we suggested above, there are some factors that may point towards an alleviation of some present day concerns but this is an extremely complex field and there are many unanswered questions. If recent years are any indicator, climate issues will rise higher on the global political agenda and receive media coverage. Debate will most likely continue to rage. Awareness will trickle down to the level of most consumers. This is however one area in which change predicted in Future Traveller Tribes 2020 hasn't perhaps materialised as rapidly as in some other areas. The global recession has taken focus away from efforts to reduce greenhouse gas emissions, and the cost of emissions remains very low for the time being.

% OF CONSUMERS WHO ARE CONCERNED AND VERY CONCERNED
GLOBAL AVERAGE | 2014



Source: National Geographic Greendex/nVision | Base: 1,000 online respondents per country aged 18+, 2014

What is important to consumer-facing travel services is what kind of emotional resonance the idea of a changing climate will have with consumers, how far consumers will identify their own individual travel behaviours as a significant contributor to the problem, and how likely it is that this would prompt the response of reduced or reformed travel, even if this would come with personal expense or sacrifice of some kind.

Studies over recent years have suggested that moral sensibility sometimes gives way to price sensitivity, and the extra effort required to research and source environmentally-friendly or otherwise ethical goods is too much for many consumers in practice.

Unless we see a shift in consumer psychology over the next 15 years, we imagine that ethical concerns will have a substantial impact only on a relatively small but dedicated and truly altruistic group of travellers. However, other consumers will factor ethics into their decision-making in alternative ways as a means of making a positive contribution. The internet has put into the hands of consumers more powerful tools for the probing of corporate claims of all kinds. The “new normal” will be an increased standard of sustainability transparency demanded by consumers – particularly of brands in the airline and wider travel industry.

“ Today a small percentage, perhaps 10 to 15% will seek out the greenest method of travel, but the percentage who choose not to travel entirely because of environmental impact is so minute as to be statistically irrelevant. ”

Ray Hammond, Futurist



THE WORLD IN 2030: THE TECHNOLOGICAL LANDSCAPE

There has been a tendency in the market research community to segment consumer groups along the lines of their degrees of resistance to “Technology with a capital T”, a tendency founded on the notion that the digitalisation of lives, societies and processes is something which can be actively identified, circumscribed and opposed if any citizen so wished. Even now, the idea that Technology is something that any man can walk away from seems preposterous. As smartphone penetration approaches ubiquity, connectivity covers the globe and today’s techy Gen Xs begin to form the upper age brackets, descriptions of consumer groups untouched by technology lose all meaning entirely.

What will separate users will be their preference for certain kinds of computer interface and certain kinds of experience from technology. Some will go so far as to insist that technology has made the world worse, even as they rely heavily on it for their material wellbeing, personal security, social fulfillment, continuing good health and freedom of opportunity. The high-tech ecosystem will be diverse enough to accommodate this nostalgia for a pre-digital age, and any other conceivable attitude.

Some will prefer those “ambient” technologies which blend invisibly into the background. Some will prefer those which drastically alter reality before one’s eyes. Some will prefer those with the look and feel of the analogue devices of yester-year. Some will ask technology to play human. Some will engage with technologies on its own terms and in its own languages.

Many of the digital communication aids, distribution systems, sensing and identification technologies, and choice management tools described here already exist in some form. Their potential lies in their migration from the drawing boards and into hands, homes, hotels and hearts of billions worldwide over the coming decades.

That being said, we must be careful about overstating the case that technological systems will sweep away all existing operational inadequacies, create dazzling new efficiencies and handing a chalice of infallible consumer insight to first-mover businesses, particularly if this involves passing the operational buck to technology and devaluing human input. Basic customer service must still be high on the agenda, and the basics will still be difficult to get right, particularly for machines alone.

These technologies have the potential to help brands engage with consumers with offerings personalized to an unprecedented degree, and therefore to make the experience of flying safer, faster, cheaper, more convenient and more comfortable for the consumer. We discuss the potential and implications for this below.

CONNECTIVITY, EVERYWHERE

“ Business people want to continue working 24/7 no matter where they are, where they’re travelling to, how they’re travelling and what they’re doing. There is no longer for these people a division between work, relaxation and playtime. Anytime is potentially worktime. Everything that they enjoy at their place of work, be it a mobile place of work or a fixed office, they want with them all the time wherever they are, and that does include on aeroplanes and trains, and in cars and hotels. ”

Peter Cochrane, Futurist and Entrepreneur

Only the seriously impoverished have to go unconnected in this century. For many, it is a case of which connected luxuries will be built on top of this fundamental right.

Telecoms providers will put agreements in place for cheap international roaming – but Wi-Fi will be the main source of connectivity, and will be ubiquitous. Today's travellers are likely to seek out hotels and flights with Wi-Fi; tomorrow's will view its absence as an oddity. Consumers will choose between options not on the basis of whether or not there is Wi-Fi, but how fast it will be.

More broadly, a superstructure of connectivity will support a vast global demand for instant communication, and activate a multi-billion device "Internet of Things" comprising, potentially, driverless modes of transport, smart cities and connected homes.

2030's connection will be 5G, the fifth generation of mobile network. 5G will not represent the next in a series of incremental improvements, but a quantum leap in connection speeds. When Samsung announced the technology in 2013 it was testing at speeds of 1Gb/s. Today, researchers at the University of Surrey's 5G Innovation Centre (5GIC) are working with speeds of 1TB/s. This is more than 65,000 faster than average 4G download speeds. It is likely that expectations will be revised upwards further still as 2030 is approached.

In terms of timings, South Korea – the pioneers of 4G – aim to have a trial network in place by the time of their hosting the Winter Olympics in 2018. Elsewhere, we can expect trial networks in place by 2020, and for 5G to have made significant inroads globally by the middle of the next century.

In-flight cashless payments, real-time tracking of flight progress, HD video streaming... these technologies already exist, albeit only on some, generally premium, tariffs. As they go mainstream, and potentially make their way into the systems of even LCCs, by 2030, they will improve organisational efficiency and the customer experience.

Connectivity is not just a facility – it is also a lifestyle. It is a lifestyle that some will relish, and some will look to escape. Connectivity and connected devices will be ubiquitous. To expect to be able to find spaces worldwide untouched by technology, and travel experiences which are largely "analogue", will be (if it is not already) rare.

However, we expect to see some form of today's "Digital Detox" holidays existing still in 2030. Though they will not be able to offer a wholesale absence of connected technology (this could be impractical, even personally damaging in 2030), they will be able to offer curated experiences in which technology seems to disappear in favour of a nostalgic "simple things in life" experience. This may be a highly technologically-sophisticated illusion. Arthur C. Clarke said that "any sufficiently advanced technology is indistinguishable from magic". The cliché of the "magical holiday" will take on new meaning in 2030.

POLYMATH DEVICES

Tech will play a greater part in the lives of billions. It will not just be the system in which they operate, but it will be in their hands.

Though it is very difficult to predict what exact form 2030's consumer technologies will take, we can be certain that they will be highly portable. They will not stand alone, but interact with the billions of other connected devices in the world. They will therefore position themselves as mediators of our social relationships. They will allow a vast amount of information to be retrieved instantly, accurately and while on the move. They will be mobile, but not necessarily mobiles. They will almost certainly integrate themselves seamlessly into our lives; often we will forget that they are there. Most importantly, their range of functionality will become more diverse (in ways which we cannot at this point possibly imagine).

Smartphones can already be used in radically different ways by travellers – apps exist which allow users to meticulously research and store itineraries, but also to improvise on the spot. We should see mobile tech as an enabler which allows all manner of travellers to meet their varied goals ever more effortlessly – and without the need of third party help.

What will be radically game-changing on a global level is not necessarily pioneering new technologies, but the mass-availability of the low end as devices become cheaper and earning capacities expand. It is in the nature of networking increasing numbers of humans that even more powerful efficiencies can be gained.⁹

“ Integration [of booking] with our gadgets is the most important thing. I bought a train ticket the other day and by pressing one button, I had the ticket in my email, the travel plan in my Outlook calendar, with the train times, seat and everything. So I didn't need to write down anything. I went onto the website and I bought the ticket. Information, platform, seat, everything in your calendar. Cross country from London Luton to Leicester. Then I ran out of battery and I was in trouble – but the theory is there! ”

Business Traveller, Spain

COMPUTERS LEARN HUMAN

Automation and robotisation will change the shape of the future workforce. This may also be an economic wildcard for developed economies, challenging assumptions that they will grow at a significantly slower pace than emerging economies focused for the time being on manufacture and exports.

Broadly speaking, consumer-facing technologies will have organic interfaces and use natural language processing – the main aim of technologists and technicians going forward will be to make technology behave like people.

Many roles once filled by human workers will be staffed by search algorithms, robotic bellhops, cashless payment systems, virtual customer service avatars and fluid biometric processing systems. Gauging changing consumer perceptions and social attitudes will be crucial in working out over the next years the ideal human-machine ratio in the service mix.

Will we, as we do currently, allow routine transactions with brands to be mechanised, but demand a human presence for when things go wrong? Will even human staff, briefed perhaps in real-time (via wearables) about our preferences, be appreciated as adding a human touch, or branded as false or creepy equivalents of robotic or computerised alternatives? Will ambitious gadgetry be dismissed as wasteful pie-in-the-sky if brands cannot first master the basics of customer service? This is a question of advancement in technological capability, but also of customer attitudes towards these technologies, which will not be uniform.

Jarring against our desire for data-driven personalisation and seamless efficiency will be our nostalgia for human interactions. Human staff, with all their bumbling idiosyncrasies, may in certain contexts provide competitive advantage, seen as providing a more authentic kind of service and cultural experience. This will apply at certain points in the consumer journey (outside of airports particularly) more than other stages. In any case, consumers will expect better customer service, and better providers of it will understand that “upscaling” does not necessarily mean implementing the most advanced technological solution.

“ Automation and robotics will change manual work (primarily) over the next 15 years, not totally, but significantly enough to drive the developed economies – by which I mean western Europe, North America, Australia, Japan and some others – back to a slightly higher growth rate than people are currently contemplating, possibly at just over 3% compound over the next 15 years. ”

Ray Hammond, Futurist

BODIES OF RESEARCH

Each new iteration of a consumer device collects data not only more accurately, but more ambitiously. In particular, we are seeing the emergence of technologies which harvest biosignals in an attempt to understand our moods, responses and emotions.

Smartphones, but particularly health bands and smartwatches, are already using embedded sensors to capture information about changes to heart rates and other vital signals. By scanning faces, computers are beginning to reach the level of sophistication needed to decode unspoken reactions to a movie, political debate or video call with a friend. Neural scanning technologies already give some insight into the physiology of feeling. Voice biometrics and algorithms which look at the syntax of our writing to guess our feelings already have wide business applications. As these more invasive (or so they may be seen) technologies develop, they will change the terms of exchange in the emerging data market, though whether in favour of greater willingness or resistance to sharing is yet to be gauged.

This would represent a big step in terms of what businesses can learn about their customers, and the level of personalisation that could be offered. Biometrics also hold potential for new secure and streamlined payment methods, and the monitoring of biosignals would help with the reading of potential security risks, or the identification of vulnerable or unwell travellers in need of assistance, even in a crowd.

Airports have special leverage in the biometric data economy. Sharing of biometric information may be a routine part of security procedures, and therefore a sine qua non of passing through customs. These systems will not be perfect by 2030 and we cannot underestimate the amount of red tape that will accumulate here. However, consumer-led pressure to make the customs process less cumbersome, combined with the (no doubt long-continuing) sense of a global terror threat, could produce rapid innovation in this area over the next 15 years. Consumer attitudes will also progress. If the extraordinary benefits of sharing physiological data are made clear to consumers, knee-jerk distaste for the idea could quickly convert to natural willingness.

REMOTE CONTROL

By 2030, every square inch of the earth will most likely have been photographed, analysed and recorded in minute detail by orbiting satellites, and every road and route mapped by the descendants of Google Earth. This will be a world with little mystery left in it. For those who choose to make these technologies part of their day-to-day, exploring the boulevards of a new locale is not so much a journey of discovery as a reassuring confirmation of what has already been known and seen.

Similarly, online simulations of various kinds have brought the digitalisation of “try before buy”, and the consumer of the future will have ever greater power to reliably pre-test any product and pre-experience any experience if she so wishes.

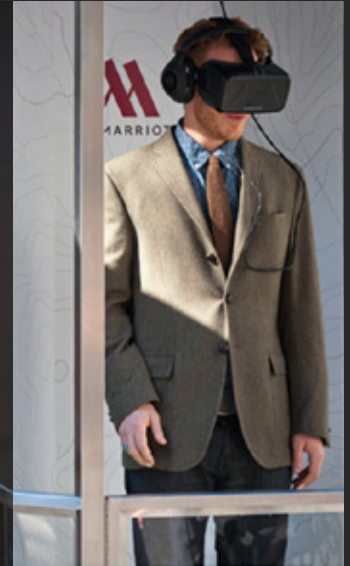
Hotels and airlines will offer immersive “previews” of their services through virtual reality technologies. Today these are primitive and monosensory – geotagged photos, GoPro remote tours, interactive videos. In the future, brands will offer immersive, virtual reality evolutions of this concept using technologies such as Oculus Rift, bought by Facebook in 2014 with precisely the purpose of extending the VR headset’s potential to applications outside of gaming.

Technically, these applications will be well able to cater to our wildest imagination by 2030. They could transport us to the other side of the world and back in minutes. They will take us on journeys into remote times as well as places. They will offer highly theatrical and diverting experiences.

Trend in Action

Between September and November 2014, **Marriott Hotels** toured a selection of US cities with eight “Travel Teleporters”.

Each Teleporter was fitted with a VR Oculus Rift headset, providing users with an immersive sensory experience of the Black Sand Beach in Hawaii, the top of a skyscraper in London, and Marriott’s custom-designed “Hotels of the future”.



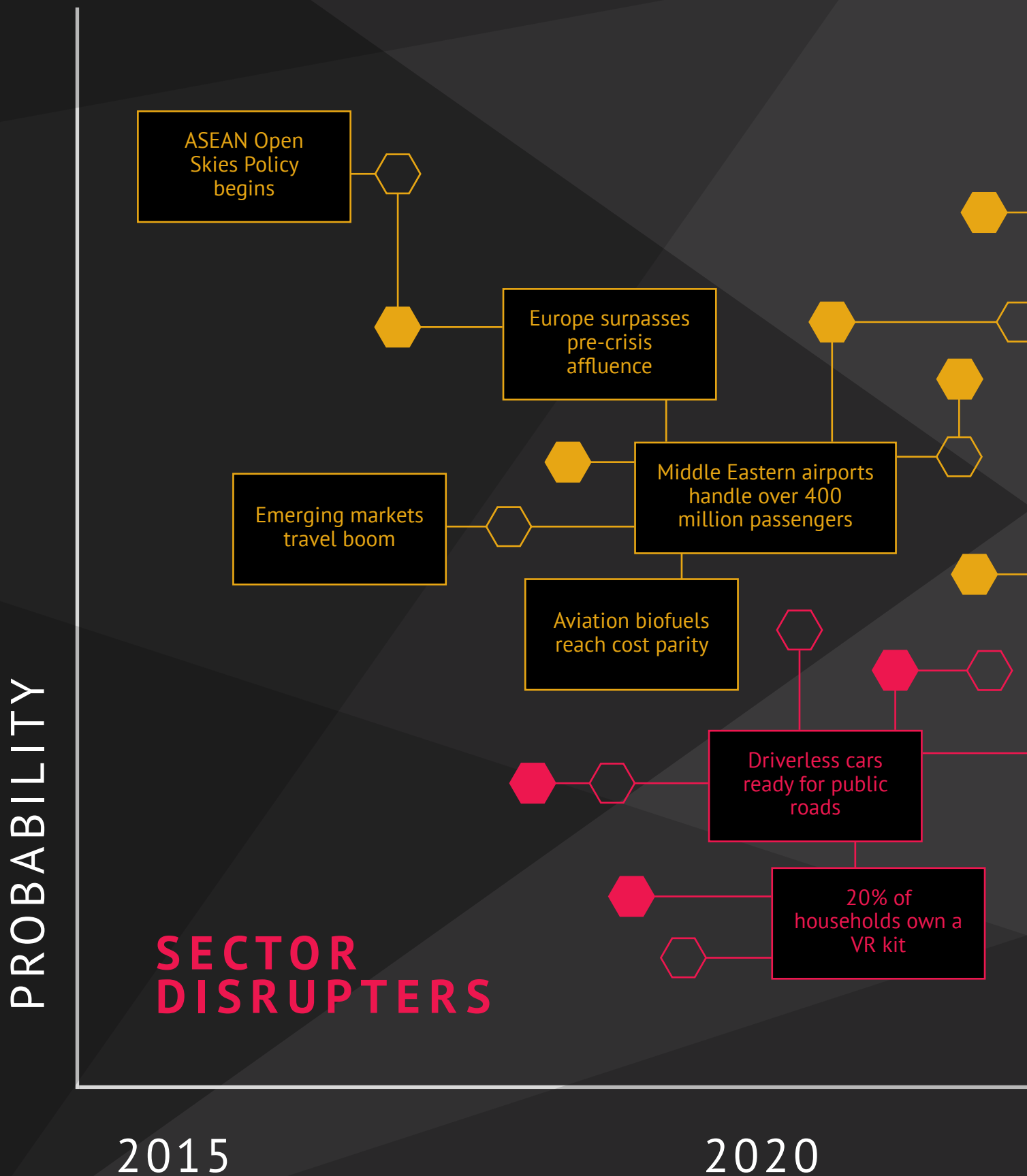
Whether they can offer true travel is a question for philosophers more than brands. Pragmatically, no matter how powerfully technology can realise these visions, they will be no substitute for travel. Their role will be supplementary. To claim otherwise is to be overly generous to the power of the technology, and to simplify the needs of the traveller. Nonetheless, they are worthy of investment from travel brands if only for the fact that simulations can, presented to consumers, mitigate risk of disappointment, and encourage more adventurous travel to more diverse regions.

In some contexts, this will be a routine part of the booking process, particularly for flights and hotels. In others, arguably those closer to the heart of the motivation to travel, this will be a highly divisive option. “Spoiler consciousness” is already strongly operant in the way in which global customers consume serial media. Suspense, anticipation, the allure of the unknown... these qualities will prompt many to step away from the headset.

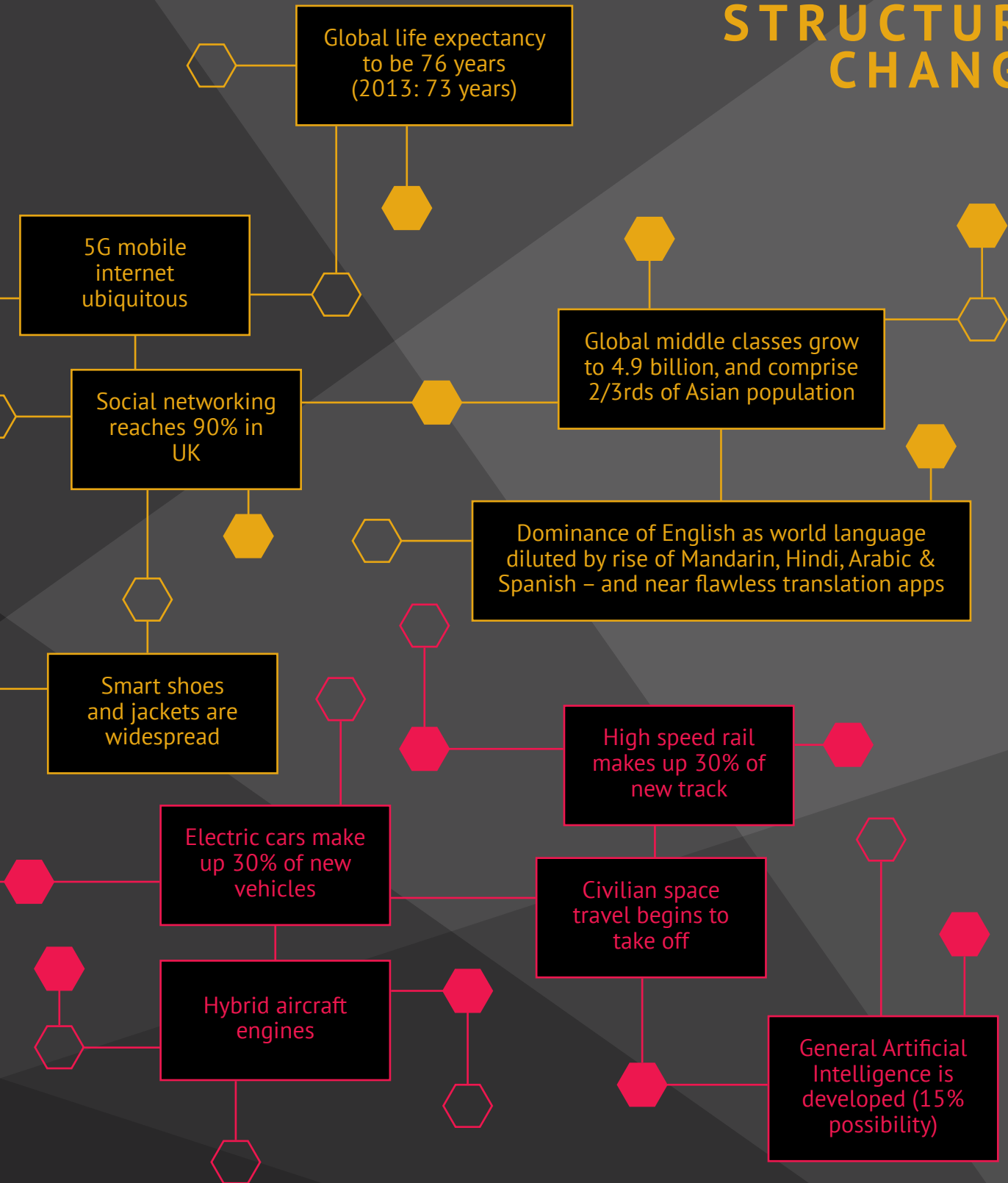


TRAVEL TECH TIMELINE

Here we present some speculations for how certain travel technologies, and their shaping macro-trends, will evolve over the next 15 years.



STRUCTURAL CHANGES



2030

WHAT ARE “TRIBES” AND WHERE DO THEY COME FROM?

The drivers discussed above are the shaping contexts for the traveller groups of the future; now we move on to describe these groups. Demographic, economic, consumer landscape and technological changes to come have been at the forefront of our minds in developing these tribes, but to segment consumers straightforwardly in terms of their adoption of and resistance to these changes, or the extent to which they are directly impacted, is not satisfactory in building a three-dimensional image of future travellers to focus on the deep-seated values and ideals that will truly impel their travel.

Many of the technologies described above are best thought of as enablers/disablers which give expression, at various points in the consumer journey, to deeper motivations. They play a large role in the imagined behaviours of the future tribes, but not, strictly speaking, a central one. At this point we explain how we presume to have accessed these motivations.

THE HISTORY OF CONSUMER TRIBES

The notion of differentiating between groups of consumers on the basis that they have different characteristics that make them suitable for different products, services and marketing messages has been a well-accepted part of marketing practice for decades.

Such groups, which can be referred to as tribes or segments, can be differentiated on the basis of any of a number of features such as demographics, attitudes to the product category in question, in-category behaviours, geographical location, product needs, product consumption occasions, and others.

Much has been written in the marketing trade press over recent years about the so-called “segment of one”. This refers to the idea that modern consumers increasingly demand the kind of personalization in delivery of products and services that effectively treats each consumer as an individual. Such an argument is, indeed, in line with the prevailing consumer trends that we have discussed in previous sections.

Furthermore, the kind of hyper-customisation that consumers are already starting to look for will continue to grow so that by 2030, we expect it to be a default expectation among many consumers, in certain situations at least. Clearly, this philosophy runs counter to the notion of segmentation, which, in its essential form, is about attempting to group consumers together on the basis of shared needs.

We believe that considering tribes or segments of consumers is still a valid exercise, and will continue to be so for the foreseeable future. While consumers are individuals, and increasingly recognize themselves as such, there is sufficient sharing of travel-related needs that it is possible to group consumers together, given the significant efficiencies in marketing that this approach can provide. Our understanding of what constitutes a valid and efficient group has however had to change.

A NEW KIND OF TRAVELLER, A NEW KIND OF TRIBE

When Amadeus last looked at the issue of traveller tribes, back in 2007 when they looked ahead to the world of 2020, the groups that were defined were built largely from functional building blocks such as demographics, nationality and travel behaviour (e.g. business versus leisure travel).

Fast-forwarding now to 2015 and building tribes that will be relevant to the world 15 years hence, we believe that a new approach is needed.

Over the past ten years we have seen considerable evolution in societies and technologies, and an increasing awareness of complexity. We occupy multiple roles in our lives, each carrying different responsibilities and requiring different forms of support from brands.

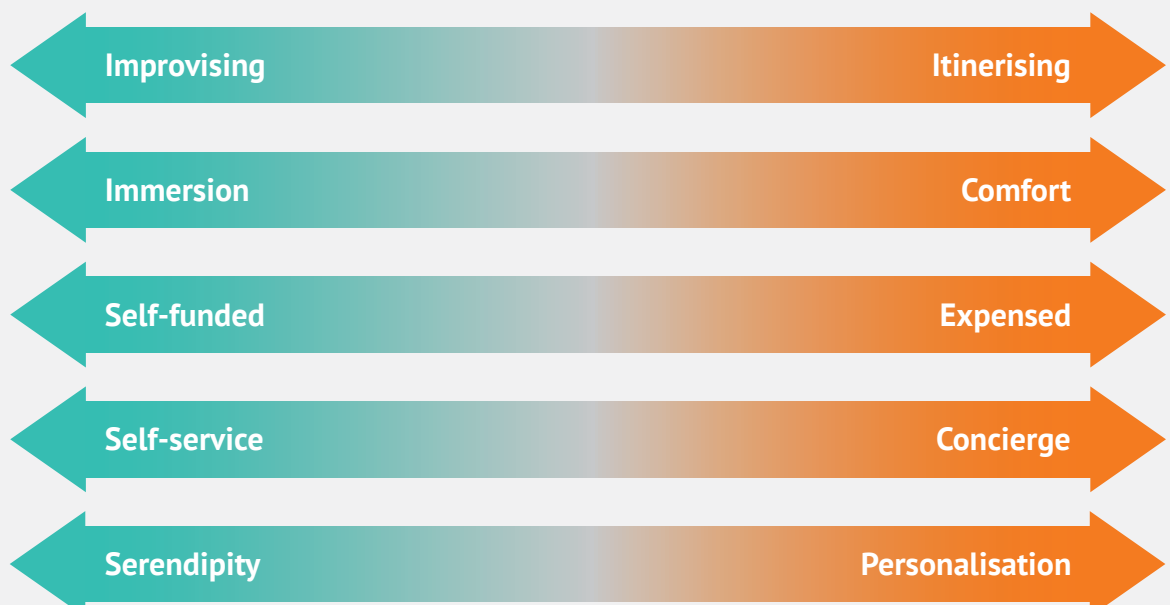
Because of this we have decided to build traveller tribes for 2030 on the basis of more fundamental and relevant building blocks. By considering what travellers are and will be looking for from their travel we remove less relevant “hygiene factors” such as those used to build tribes in the past, and produce groups that are united by their shared desire for a particular type of travel experience.

At the same time, we recognise that these tribes are not mutually-exclusive and distinct silos into which consumer groups can be neatly placed. We acknowledge that any one traveller’s attitudes exist on a spectrum (risk-seeking vs risk-averse, choice-limited vs choice-liberated etc), and, though many readers will recognise broad similarities between their own behaviours and those of one or more of the groups here, this recognition will naturally be partial.

Furthermore, their position on any one of these spectrums may have no absolute bearing on their position on any other. Any one traveller’s behaviours and attitudes vary according to their priorities and obligations for any particular trip, and may well differ greatly when it comes to a different trip. Theoretically, the motivating values characterising each tribe can guide decision-making at every step in the consumer journey from inspiration to evaluation, and they have been designed with this criteria in mind. However, any one traveller may also shift between a number of camps at different points in their journey, or be nudged from one camp to another if something goes wrong or if some intervening circumstance disrupts their plans.

The tribes are best thought of as provocative caricatures, capturing clusters of behaviours and requirements, designed to inspire conversation amongst travel brands about the support services they will offer to tomorrow’s travellers.


SOME ILLUSTRATIVE SPECTRUMS



THE PROCESS OF DEVELOPING TRIBES

The six tribes described in this document were the result of a careful and considered process, representing our belief that it is only when "science meets creativity" that a vision of the future can be created that is simultaneously compelling and defensible. Clearly, tribes have to be recognisably real but at the same time show signs of their being products of the enormous change we will see in the future. They have to be both creatively visualised but also rooted in a measurable truth. We strongly believe that our tribes achieve this.

The journey by which the tribes were hypothesized, constructed and then validated involved various teams and resources at Future Foundation, consumer and industry representatives in 12 global markets, key members of the senior team at Amadeus, and recognised futurologists and travel experts (see Appendix for details). It consisted of 6 key steps, as follows:

1. The project team were briefed on Future Foundation's roster of 60 established and emerging consumer trends. These trends are relevant across consumer trends rather than being travel-specific.
2. The team evaluated the trends on two key dimensions:
 - a. Importance to consumers in 2030 (using forecasts and judgments based on Future Foundation's tracking data);
 - b. Relevance to travel.
3. This first-phase analysis produced a subset of some 25 trends which formed the basis for a first immersive workshopping process where the trends were further evaluated and regrouped, producing 10 focus areas.
4. These focus areas were validated and characterised by means of qualitative research, consisting of:
 - a. In-market research utilizing Future Foundation's network of trendspotters in 12 markets (see Appendix for details);
 - b. A series of in-depth interviews with 4 recognised futurologists and travel experts;
 - c. A series of in-depth interviews with 5 senior Amadeus staff.
5. Having thus validated many of the driving forces that will shape the needs of future travellers, Future Foundation developed hypotheses for a number of traveller tribes.
6. These were presented, discussed, evaluated and refined at a second immersive workshop, resulting in the 6 tribes presented here. 

INTRODUCING SIX TRAVELLER TRIBES FOR 2030

As we have explained, thinking has evolved in two ways since 2007 and the previous report. We have moved from a “demographic” to a “psychographic” approach, and we have extended our reach forward from 2020 to 2030. By way of an introduction to our six tribes, it is useful at this point to explain how we have re-framed 2007’s tribes.

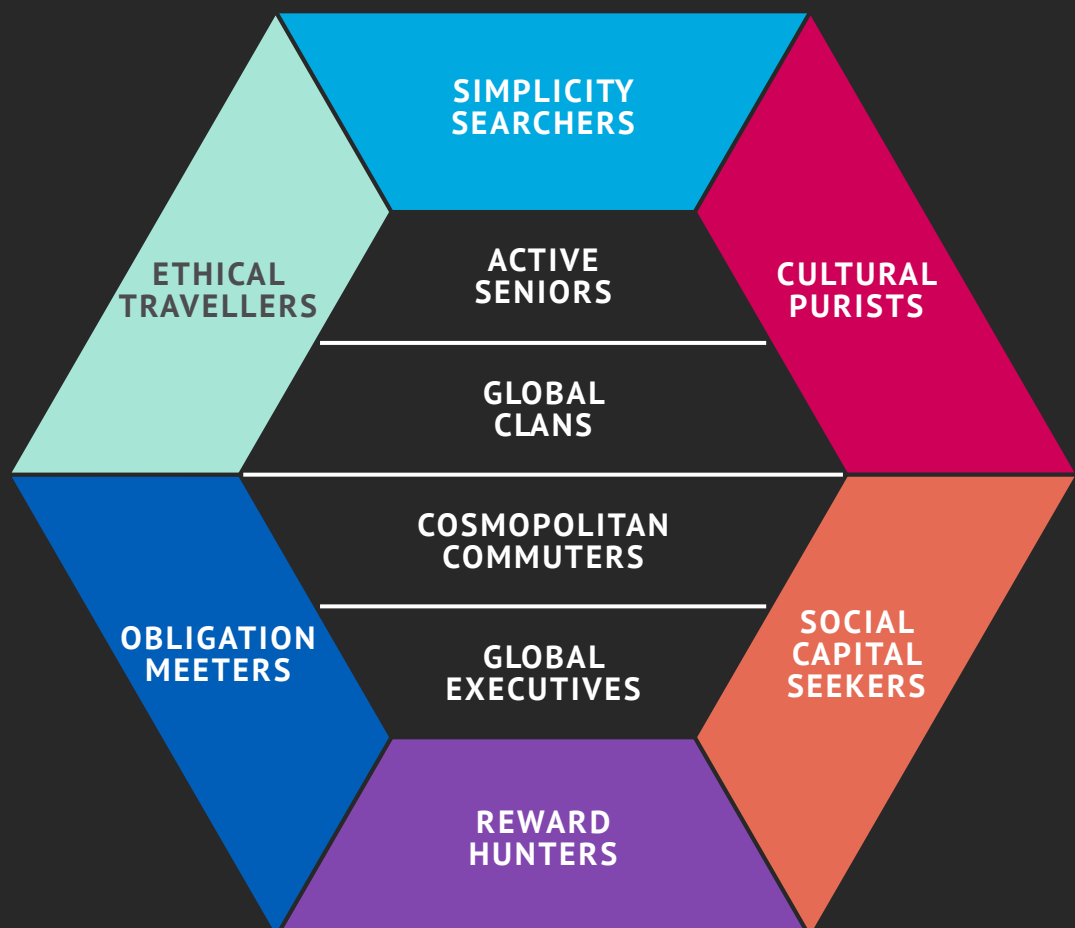
ORIGINAL FOUR TRIBES FOR 2020

Active Seniors. As global populations age, there will be more healthy and active retired people (aged approximately 50-75 years by 2020), with more disposable income, taking holidays and short breaks to relax and enjoy life and the freedom of retirement.

Global Clans. With the global growth in migration, increasing numbers of people are travelling internationally, either alone or in family groups to visit family and friends for holidays which enable them to be together and re-connect.

Cosmopolitan Commuters. Growing numbers of people are living and working in different regions, taking advantage of falling travel costs and flexible work styles to give them greater quality of life.

Global Executives. Senior executives making short and long-haul journeys abroad on business, travelling in premium or business class.



EVOLVED SIX TRIBES FOR 2030

We see these categories to have touched upon some valuable distinctions, and many of the themes which inspired these categories – ageing societies worldwide, the growth of flexible working options, the growth of VFR travel and multi-located living – are drivers which we see having continuing importance past 2020 and into 2030. However, we have looked past the superficialities of demographic breaks, and drilled into the key motivations and needs behind these categories, emerging with six tribes, as follows:

Simplicity Searchers value above everything else ease and transparency in their travel planning and holidaymaking, and are willing to outsource their decision-making to trusted parties to avoid having to go through extensive research themselves. This group takes in **Active Seniors** and **Global Clans** principally.

Cultural Purists treat their travel as an opportunity to break themselves entirely from their home lives and engage sincerely with a different way of living. Elements of this tribe are similar to **Cosmopolitan Commuters**.

Social Capital Seekers understand that to be well-travelled is an enviable personal quality, and their choices are shaped by their desire to take maximal social reward from their travel. They will exploit the potential of digital media to enrich and inform their experiences, and structure their adventures with the fact of their being watched by online audiences ever present in their mind.

Reward Hunters are the luxury travellers of the future that seek a return on the investment they make in their busy, high-achieving lives. Linked in part to the growing trend of wellness, including both physical and mental self-improvement, they seek truly extraordinary, and often indulgent ‘must have’ experiences.

Obligation Meeters have their travel choices restricted by the need to meet some bounded objective. Business travellers are the most significant micro-group of many falling within this camp. Though they will arrange or improvise other activity around this purpose, their core needs and behaviours are mainly shaped by their need to be in a certain place, at a certain time, without fail. We expand here on many of the behaviours described in **Cosmopolitan Commuters** and **Global Clans**.

Ethical Travellers allow their conscience, in some shape or form, to be their guide when organising and undertaking their travel. They may make concessions to environmental concerns, let their political ideals shape their choices, or have a heightened awareness of the ways in which their tourism spend contributes to economies and markets. Ethical consciousness was referenced in 2007 as being important to **Active Seniors**.



GETTING TO KNOW SIMPLICITY SEARCHERS

INTRODUCTION

The prospect of a “leisure society” has been much vaunted over the years. Nowadays it is often described as a techno-utopianist fantasy – if it hasn’t happened up to now, it won’t happen. And, indeed, the four-hour work day seems like an alien concept to those in many advanced economies (and particularly so in emerging markets), with people working longer hours generally than at any time in the last century.

Nonetheless, micro-work networks, industry technologisation and robotisation, and the improving efficiency of digitalised service industries will mean that, for those willing to spend, there will be no administrative chore or research task that cannot be outsourced to some human or (increasingly) machine agent. Material affluence in 2030’s developed or developing markets will be such that many will be in the position to live this way round-the-clock, and those who are not will still treat their holidays as an opportunity to experience this kind of lifestyle.

Simplicity Searchers will invariably take these options. They will want as much as possible to be done remotely or by third-parties. They will want options to be laid out before them in simple and transparent formats. They will not insist on managing every little detail of their break on a granular level, but use third parties and systems to simplify their choices into traditional packages, or “bundles” of choices.

Holidays for this tribe represent a rare time in life to pamper oneself. Challenging oneself is not a priority. There is a paradox at the heart of this tribe – they may want nothing more than escape, rest and rejuvenation, to forget home life and its worries as far as possible, but true ease relies on these home comforts. They may be money-rich and time-poor. They may feel “burnt out” by their busy lives. Simplicity Searchers will be largely uninterested in engaging with different cultures or broadening their horizons. Their ideal will be to safely and comfortably flip the “off” switch on their consciousness for a fortnight.



Many millions of new travellers from emerging markets will fall within this category. They will be attracted to packages which offer the ability to dip a toe in the waters with the assurance of their safety and enjoyment, and a structure for their experience in place. A sense of “adventure” will be less important than “the basics”, whether that be the simple pleasures of good food and good weather, or taking in the iconic cultural landmarks spurned by more seasoned explorers.

Amongst all of the technological innovation and lifestyle change described in this report, the behaviours of this tribe will look the most familiar to travel providers.

DIRECTIONS FOR SIMPLICITY SEARCHERS

Experts for everything. A diverse “decision-management” industry will exist in 2030. The “agency” ecosystem will surely grow, encompassing traditional travel agents, digital and social media agents and even algorithmic or “robo-agents” (along the lines of the “robo-brokers” currently disrupting the investment advisory industry).

Peer-review networks will commonly be officiated by brands, a move which, providing that they are not overwhelmed by paid input, which must be clearly flagged, could bring regulatory standards to these boards which will reassure future researchers that the advice they find there is legitimate and impartial. Simplicity Searchers will want access to a knowledgeable community to whom they can delegate their decision making.

Emerging market presence. The rising BRIC middle-classes take with them on holiday particular preferences and behaviours. Many millions of new travellers will seek out iconic tourist sites for the first time. Many will demand “home-away-from-home” modifications and accommodations which will bring a new degree of interculturalism to Western nations.

On the other hand, the world is arguably homogenising in certain ways along Western lines, for example, in the adoption of traditional Western luxury brands amongst consumers in emerging markets, and in the move to Western-style shopping malls across the world; it is possible that the current West-led orthodoxy about what e.g. a “typical” holiday should look like may shape the behaviour of new emerging market travellers. However, beyond 2030 this category may begin to fade as travellers from these markets move up the “hierarchy of needs”.

TRAVEL BEHAVIOURS AND NEEDS

Inspiration and booking

Choice-management services. Many will have largely planned out their break at the initial stage, limiting the points at which they can be successfully approached.

Simplicity Searcher Service Choice

Launched in late 2013 by **Four Seasons**, **Pin.Pack.Go** is a holiday planning service that “re-imagines the way travellers share and receive travel recommendations”.

The service enables **Pinterest** users to receive personalised recommendations from Four Seasons’ local experts

Panners can use Place Pins to create a virtual map of your vacation itinerary using their own findings as well as the Pin.Pack.Go recommendations.



Previewing and reassurance. Simplicity Searchers will pass on responsibility for the success of their trip, but they will not want to feel powerless over their future. They will want reassurance. They may use a smart algorithm to determine their perfect option for a seat on the plane, but they may also want to validate the result with their own eyes before clicking the book button. They will take opportunities to use immersive technologies such as VR to “preview” their plane seat, hotel room and holiday activities.

Personalised packing guidance. Much can be done to take the palava out of packing, which is a pet-hate of the Simplicity Searcher. Airlines can make their luggage allowance criteria more transparent and uncomplex, laying out clear options with scaled prices. LCCs in particular often present this information to consumers separately from up-front costs. This may be attractive to some customer segments but it comes at the expense of the goodwill of Simplicity Searchers.

Better direct. Simplicity Searchers will spend more to avoid layovers, connections and changes during the journey. They will often choose the most rapid transport options, and may not travel too far afield in order to avoid long flights. They will ask for their accommodation to be nearby to the airport and local amenities. They set heavy store in effective public transport infrastructures.

Deferred payment. They may choose affordable credit options for their holidaymaking, providing that these options are laid out transparently, and the payment schedule is made easy to understand.

At the airport

Info-light navigation. Simplicity Searchers will favour user-friendly, non-invasive forms of technology. Wearables will fit their purposes like a glove. They will use navigation technologies which tell them where they need to go, preferably with very little in the way of manual input into apps required and no staring at screen required.

A service, for example, which used geolocation data, willingly shared, to create an augmented-reality route map through an airport space, or other intuitive solution, will be widely used. They will happily be shepherded by smart airport systems, and will readily share their data if this can be shown to result in more streamlined and hassle-free processes.

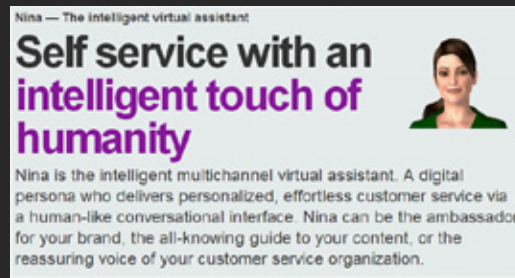
Culturally-sensitive service. Many millions of new travellers will be Simplicity Searchers. Whilst the rebalancing of global power presents an imperative for travel companies to expand their global reach, it also challenges them to re-engineer strategies to effectively engage multi-ethnic (and multi-linguistic) consumer-citizens holding values and attitudes towards brands and behaviours that so often differ from those in established markets. There is a strong argument to be made for the automation of service along these lines, or for supplementing human service with connected aids – how else would it be possible to address each customer in her native language?

In-flight

Proactive in flight entertainment. Ever willing data sharers, providing that the benefits of this sharing are apparent to them and are directly linked to the data being shared, they will be happy to disclose their media preferences to brands – perhaps by giving access to historical records of their use of subscription streaming services – to receive tailored content in-flight. The future of in-flight media obviously does not feature heavy, costly hardware (built into the backs of seats). Consumers will be mainly tablet-equipped. Airlines will build branded media platforms (the in-flight magazine for 2030) and offer free or reduced content as an incentive to use this platform in-flight (as opposed to whatever other apps they could use).

Simplicity Searcher Tech Choice

Intelligent systems company **Nuance** has created **Nina**, an online assistant which can use natural language processing and voice recognition technologies in order to hold a colloquial conversation, attempting to mimic natural speech as closely as possible. 2013 saw both U.S. Bank and USAA trial the Nina software in its customer service operations.



On arrival and at destination

Mobility. Simplicity Searchers are the most likely of our tribes to have health and mobility needs. These could be catered for in some ingenious ways in the future, in the form of biometric health tracking and geolocation-broadcasting mobility equipment.

“Bucket-list” tourism. First-time tourists may be attracted to better-known global landmarks.

PREFERRED TECH

User-friendly interfaces. Interfaces which engage on a simple Question and Answer basis will be preferred here.

Translation apps. By 2030, mobile translation software will have advanced so as to allow not only real-time casual conversations to take place, but for in-depth conversations rich in cultural nuance and local humour. No doubt many will prefer the authentic experience, but for Simplicity Searchers, these tools will be essential in breaking down the barriers between themselves and their environments.

“ Mono-linguists will go anywhere. As they walk through the city they will be within a translation cocoon, though able to engage with road signs, advertisements, bus numbers, policemen and the public approaching them, through augmented reality and voice translation in real-time. ”

Ray Hammond, Futurist

PEN PORTRAIT

Arjun, 40, Indian, Marketing Manager

Arjun's job is stressful and exhausting, and he doesn't get much holiday time. Every year he concentrates his savings into one two-week splurge. This used to mean backpacking or skiing with his wife, but since their first child was born in 2026, they generally take more relaxing breaks built around school holidays. Holidays for him are nothing more complicated than a chance to reset, recover from a year of overwork and burnout, and cloudgaze for a sweet fortnight.

He spends his days looking at screens, so he goes to a travel agent for a more human input into his planning. He consents to share his data – his travel history, his recent browsing history, his media habits, his quantified self outputs, his medical needs – to help form his ideal package, but the agent also asks questions and looks to probe his more nebulous motivations for travel. The approach is a mixture of talking and telepathy, and the results are so thorough and the process so simple, fun even, that Arjun is happy with the knowledge that he is paying a little extra for their commission.

The package, taking in the destination, flight, hotel, activity, entertainment, food, insurance, etc. options, is composed of hundreds of tiny customisable modules and micro-modules, right down to the lighting options in the hotel bathroom. Arjun doesn't admit this level of granularity – fundamentally the lighting options in the hotel bathroom will have no impact on his enjoyment of the holiday, he doesn't concern himself – so he consents for the agent to use a mixture of his best judgement, and a download of his previous experiences, to shape the holiday around his “core” decisions.

The algorithm-informed judgement of the agent is also informed by the shared data of his family, creating a set of compromises of the three sets of needs and preferences.

The result is Singapore, and everything is itinerised, a nuanced mix of museum visits (in which he personally couldn't be less interested, but will keep the wife happy), and long, lazy afternoons on the beach. They even book tables at restaurants on the shore-side. All of this is recorded in an itinerary app with a geolocation-tracking function to help him keep track of where his family are at all times when their paths diverge. It already, as he sits in the travel agent's office, picks up the family wearables and the connected luggage at home, and he is also given tiny, waterproof, connected markers for the family to wear in case they want to abandon their devices at any point.



GETTING TO KNOW CULTURAL PURISTS

INTRODUCTION

“ Travellers I encounter are now looking to get away from the touristy areas to discover the ‘real’ place they are visiting. There is a need to eat what the locals are eating and do what a local would do rather than visit the over-hyped restaurant in their hotel. ”

Travel Agent, Australia

If the world is indeed liberalising, borders becoming fluid, cultures melding, markets intertwining... this will undoubtedly bring many benefits for tourists. It creates a smaller, safer, more open and more comprehensible world. But seen from the perspective of Cultural Purists, these drivers are taking from the world some of its diversity, authenticity and mystery.

Cultural Purists use their travel as an opportunity to immerse themselves in an unfamiliar culture, looking to break themselves entirely from their home lives and engage sincerely with a different way of living. Their enjoyment of the break depends on the realism of the experience brands can create for consumers of being a true-born native.

Specific activities undertaken will vary of course based on the culture this group attempts to make contact with. In many cases, it will mean diverting from the “beaten-track”. Research will be sparing, and they will be hostile to pre-planning, preferring instead to follow their gut instinct (or services which quietly and ambiently inform or guide this instinct) for what is profound and legitimate over what is superficial, populist and crassly commercial. They may avoid well-known research sources (like TripAdvisor), or consult them only to get a sense of which are the well-rated and commercially successful destinations, attractions and hotels that they should be avoiding.



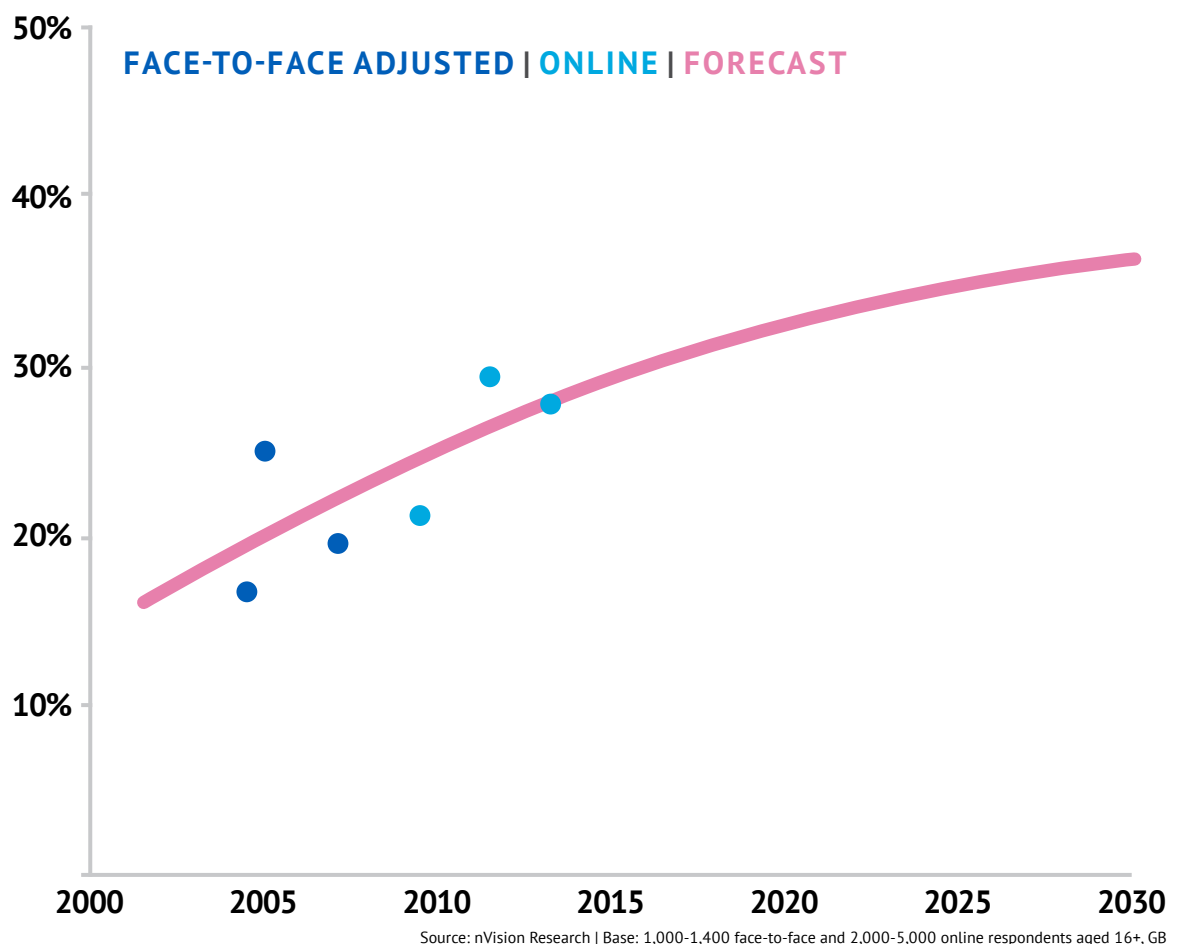
They will be educated, demanding and self-assured, and though they pose challenges to travel brands in this respect, their open-mindedness and receptiveness to propositions out of the ordinary also present terrific opportunities to airlines, rail companies, hotels and other travel providers.

DIRECTIONS FOR CULTURAL PURISTS

Dislodging of life milestones. As age-based expectations for how individuals should behave disintegrate in many cultures, so the experimentalism that has characterised, for many, youth travel behaviours spreads throughout wider citizen populations. The “Gap Year” is no longer just for students. Cultural Purism could reach wider audiences than it once has.

Global culture deficit. It can be argued that globalisation is producing a homogenisation of world cultures, often along Western lines, a trend which is sometimes described as “McDonaldization”. If this is indeed the case, the effects on the number of Cultural Purists we can expect is not clear. Will a diminishing supply of “Culture” as a commodity decrease or increase demand for it?

“WHEN I BUY FOOD, I OFTEN LOOK FOR PRODUCTS THAT HAVE AUTHENTIC ORIGINS IN A CULTURE, TRADITION OR PLACE”
% WHO AGREE OR AGREE STRONGLY | FEB 2015 NVISION FORECAST



TRAVEL BEHAVIOURS AND NEEDS

Research and booking

Taking inspiration from non-travel-related sources. Of all of the tribes presented here, Cultural Purists are least likely to let their choices be influenced by a BuzzFeed-style breakdown of top global “must-sees”. They will be more likely to travel in order to realise some long-standing ambition, or bring some long-standing intellectual pursuit to life. They may follow their reading, charting the courses of their favourite literary and historical figures, build up their knowledge of a foreign language, or time their trip with religious and cultural events valuable to them.

More sophisticated travel agent recommendations. The Cultural Purist's preference for local, or otherwise "niche" experiences, suggests a continuing role for the specialist travel agency. Today, agencies and tour operators like Intrepid, aim to help customers eat, drink, sleep, dance, sing and navigate like a local. However, travel agents will need to continually upgrade their global awareness, work harder to uncover "hidden gems" in a well-mapped world and avoid "off-the-peg" offerings at all costs. Cultural Purists are tough taskmasters, perhaps even instinctively suspicious of the usefulness of recommendations produced by commercial interests, and only the most imaginative and surprising directions will meet their needs.

"Word-of-mouth". The ideal source of inspiration for the Cultural Purist is "word-of-mouth". Any recommendation made to them should present itself in this way. Many will also use close-knit, small-scale online social networks based around particular interests and needs to kindle their thinking.

Avoiding network carriers. Cultural Purists may have a preference for the "local", meaning that they might pick out smaller airlines serving "minor" or "secondary" airports, rather than opt for major international carriers flying to well known tourist destinations.

Price sensitivity. Cultural Purists are perhaps most likely of all the tribes described here to travel alone. They may be students. They may find pleasure in holidaying as cheaply as possible, associating pampered luxury with inauthenticity.

Flexible options. Cultural Purists will value impulsiveness and experimentation, making them less responsive to propositions, even money-saving propositions, which tie them to particular courses of action absolutely, or on a repeated basis. They will be interested in flexible tariffs, will want to be able to cancel flights and accommodation at short notice if their whims take them in a different direction, and will of course be generally disloyal to any particular locale, hotel chain or airline, ruling out the effectiveness of some loyalty schemes.

At the airport

Human(like) airport concierge. Cultural Purists will resist the impersonality of cyber-mediated service. This resistance may be futile in all but the contexts of "luxury" travel (to which Cultural Purists may, generally, be less receptive). Instead we can talk about human-like digital concierge services, using Natural Language Processing, organic and analogue interfaces and culturally-adaptive software, popular amongst this group. More radically, they may embrace imperfections in customer service, to an extent, in the name of "local character". The worst thing that service can be for the Cultural Purist is bland.

Cultural Purist Tech Choice

Chicago-based start-up **Options Away** allows hesitant travellers to hold flights and lock in their prices for up to 3 weeks. Options Away charges a relatively small fee per lock-in and is only available for domestic flights.

The screenshot displays the Options Away website interface. On the left, a search form titled "Keep Your Options Open." allows users to select flight options. It includes dropdown menus for "Options From" (Chicago, IL - All Airports [CHI]) and "Options To" (Washington, DC - All Airports [WAS]). It also features date pickers for departure (08/19/2013) and return (08/23/2013), a time selector (Anytime), and passenger counts for Adults (18-64), Senior (65+), and Children (0-17). A "Class" dropdown is set to Economy, and a "Cabin" dropdown is set to All-Flg... A prominent red button labeled "Option Away!" is at the bottom of the form. On the right, a video player shows a video titled "BOSTON AUSTIN" with a play button. Above the video, three questions are posed: "Not sure where?", "Not sure when?", and "Not sure with whom?". Below the video, a section titled "Need some time to decide? Choose from..." offers four duration options: 3 DAYS, 7 DAYS, 14 DAYS, and 21 DAYS.

In flight

Charismatic transport. They may see fluid, standardised airport processes as lacking in character. They may prefer to fly to smaller, peripheral airports, or even circumvent air travel altogether as much as is possible, adding rail, ferry, boat, hovercraft and other forms of potentially charismatic transport into their travel mix when they can. This will be particularly attractive when touring multiple destinations within close geographic proximity – in exploring clusters of islands in the Asia-Pacific region for example.

They may look to imitate the locals in their travel customs and transport preferences, and may be drawn to travel planners and providers that can support this. Cultural Purists will ask that the experience of cultural immersion begins long before they leave the airport at their destination – it should be felt as they collect their baggage, as they are welcomed from the plane, even in-flight. The process must be part of the experience.

On arrival and at destination

Curated discovery. Hostile to pre-planning, the adventurer's mindset of the Cultural Purist will be celebrated by apps/tools that make suggestions and allow improvisations in situ. Better network infrastructures will make this eminently possible.

“Surprise and Delight” has been an established marketing maxim for decades. In an environment where data is increasingly leaned on and proactive anticipation of needs is increasingly held up as the ideal of service, the challenge of delivering the unexpected at scale is intensified.

Cultural Purists may be suspicious of recommendation engines, viewing them as a trap reinforcing established preferences. In other words, they want their preconceptions, likes and dislikes to be challenged, not consolidated, by their travel experience. For those seeking authentic immersion in the unknown, “personalisation” may be something to dial down wherever possible.

Unknown pleasures. Cultural Purists will be attracted to all things untouched, uncharted and unsupervised, as scarce as these experiences may be in 2030. Some consumers might be willing to go a step further and position themselves as “discoverers” of truly unknown territories, courting a sense of risk or danger (or favouring experiences where this sense is curated for them). This will come by degrees. A Cultural Purist's holiday would not necessarily exclude immersion in cosmopolitan museums, galleries and historical landmarks, rather than cafes, family-run restaurants and shanties, if this is seen to be where the heart of a locale's culture lies. However, the “touristic” will be repellent to this group.

Sharing Economists. The growth in recent years of the likes of Airbnb and Uber has been fuelled by the Cultural Purist.

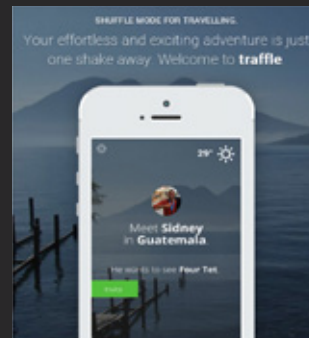
Niche “tourisms”. Cultural Purists find satisfaction in their minority status, and are attracted to niche propositions. From “food tourism” to “flower tourism”, “last chance tourism” to “music tourism”, the amount of nomenclature for travel driven by intimate connected communities clustering around a specific interest or need has grown rapidly in recent years, and it is the Cultural Purist mentality which is driving this growth.

Cultural Purist Tech Choice

Algorithms are never neutral, and peer-sourcing information can produce market distortions. Many will worry that mainstream online resources will produce global monotony, blandly touristic “hotspots” and a winner-take-all travel market in which exciting and varied experiences, places and entire cultures will be “edited out” by algorithms. This could drive demand for services which burst the “Filter Bubble”, thinking outside of the box on the traveller’s behalf.

Although we imagine that Cultural Purist may view “Technology” as a barrier between themselves and an authentic engagement with other cultures, the right apps also have the potential to make this engagement possible. Technology as we understand it today has not shaken off its association with hard logic and calculation; in the future, less intrusive forms of technology coupled with more imaginative forms of recommendation and activity-curation could help enhance, rather than dull, a tourist’s sense of what it is to be an adventurer.

Traffle advertises itself as “shuffle mode for travelling”. The app brings together information from its users’ social media accounts, and users are advised about which other people in the area they may wish to meet up with. By connecting users with like-minded peers, the app hopes to create otherwise unlikely experiences.



Apps of the future will allow users to establish a perfect point on the scale between the highly-personalised and the consciously-challenging recommendation, with the ability to “dial” up and down the element of surprise which will bring, for the Cultural Purist, all of the excitement of unknown, decoupled from its attendant risk of disappointment.

Launched in 2014, **Detour** is a mobile app which creates unusual audio-led tours around San Francisco.



The app claims to build trails around regional mythology and the home-spun tales of local raconteurs, presenting itself as an alternative to the Rough Guide for the authenticity-seeking traveller. Furthermore, the app is location-aware and aims for the effect of “ambience”, meaning that it synchronises, with rather than dictates or distracts from, the wanderings of the listener.

PEN PORTRAIT

Kwame, 28, South African, Freelance Author

Ever since his journey north to Kenya last year, Kwame has been immensely interested in the cradles of civilisation, eating up ebooks and watching documentary after documentary online. Chief among them for excitement and colour, in his mind, is Ancient Mexico. He has harboured the idea of going off and exploring the ancient ruins of the Olmecs and Aztecs for a few years now, deciding to wait until he is far enough along in his reading, and his learning of Spanish through an immersive online course (he can’t abide those phoney translation apps), so that he can really get the best from it.


He develops his plans on a social network for people interested in primitive cultures, Atavista. He follows the blogs and vlogs of experts in the field of anthropology, charismatic travellers and expert travel agents, bringing their opinions together in his mind about what approximately to do and where approximately to go on his trip – though he doesn't want to stifle the authenticity of his experience with too rigorous planning.

It is on this site, during a webinar on the provenance of the Aztec Calendar Stone, that he first finds out about a special week of events – talks, live music, poetry, dancing – held in a few months' time at the National Museum of Anthropology. Quite a few people on the site are going. Previously anxious about travelling alone, and never having gone so far afield from home before, this is just the impetus he needs – he can check in with his online friends when he is there if he feels overwhelmed.

He books his trip, customising on a granular level to strip himself of every home comfort he can stomach to lose – he wants every detail to be as authentic as possible – and pays a little extra for an open fare in case he wimps out at the last minute.

When he arrives, he logs into a sofa-hopping network to arrange for a place to stay for the night, and locals to eat with. There are plenty of options in busy Mexico City, and once he decides whom to stay with, he sends a few messages back and forth and confirms his time of arrival – roughly. He will pay cash-in-hand for three nights.

He wears his connected eyewear around the city, which gives non-obtrusive pop-up flashes of information and insight on what is around him, without detracting from the feeling of being, like a 17th century conquistador, on strange and wonderful alien soil. When touring the ruins, the audio app pools his data on his reading and his progress on a MOOC on Aztec Civilisation, to create an audio tour tailored to his level of expertise. Augmented reality brings a long-lost culture to life before his eyes.

In general though, he finds Mexico City to be too clogged with tourists for his taste, and after two days changes his plans (sending his host family an apologetic message and receiving a partial refund via automatic transfer through a payment app) and heads to a quieter village further north. Here, he uses an app to explore what is going on in the local area – what are people talking about on social media? Any events? Do I know anyone here? – and dials the personalisation coefficient down and the serendipity coefficient way up – he wants to be absorbed entirely into the local culture. 



GETTING TO KNOW SOCIAL CAPITAL SEEKERS

INTRODUCTION

Social media will play an ever-expanding role in the lives of worldwide majorities. Many however, will set a boundary between their online and offline lives, viewing networked social conversations as imperfect substitutes for “real” human contact, and their online selves as at most only tangentially related to the person they really are. They will be able to close the Facebook window and get on with their lives.

For a tribe of Social Capital Seekers, the distinction between physical and virtual, authentic and inauthentic selves will be less clear. They may even view their online avatar as more genuine. More likely though, they will have exploited the potential of their digital media to enrich and inform their offline life, and vice versa, with such skill and expertise and to such benefit that they will develop a sixth sense for the social. They will see the world in terms of its potential for creating spreadable content, with the visual sense of a film director, the narrative sense of a script writer and – perhaps most importantly to the future Social Capital Seeker – the business sense of an international entrepreneur.

Influence in 2030 will be massively monetisable. The right Tweet to the right brand is already worth something. In the future, all consumer-facing brands will tier their offerings in some way according to the level of customer clout (this data is very easily accessible and calculable). This economy is currently embryonic and informal, and customers are more often than not the active party here. Going forward, customers will be proactively invited to rent out their channels to brands for a fee.



“ Tomorrow’s data scientists will be focused on uncovering new insight into social behaviour to better identify the key influencers within a social network. Personalisation, around bundled and unbundled services including of price, will be linked to the traveller preferences, value and their position within the social network. Travellers will use intelligent agents to sift through large volumes of vendor offers to bring out those that are most relevant to the user. ”

Norm Rose, President of Travel Tech Consulting, Inc.

Travel will be enormously attractive to this group. Travel has always carried social capital, and our appetite for updates from our adventuring friends and families will be infinite. Moreover, it makes compelling content for those looking to reach mass audiences.

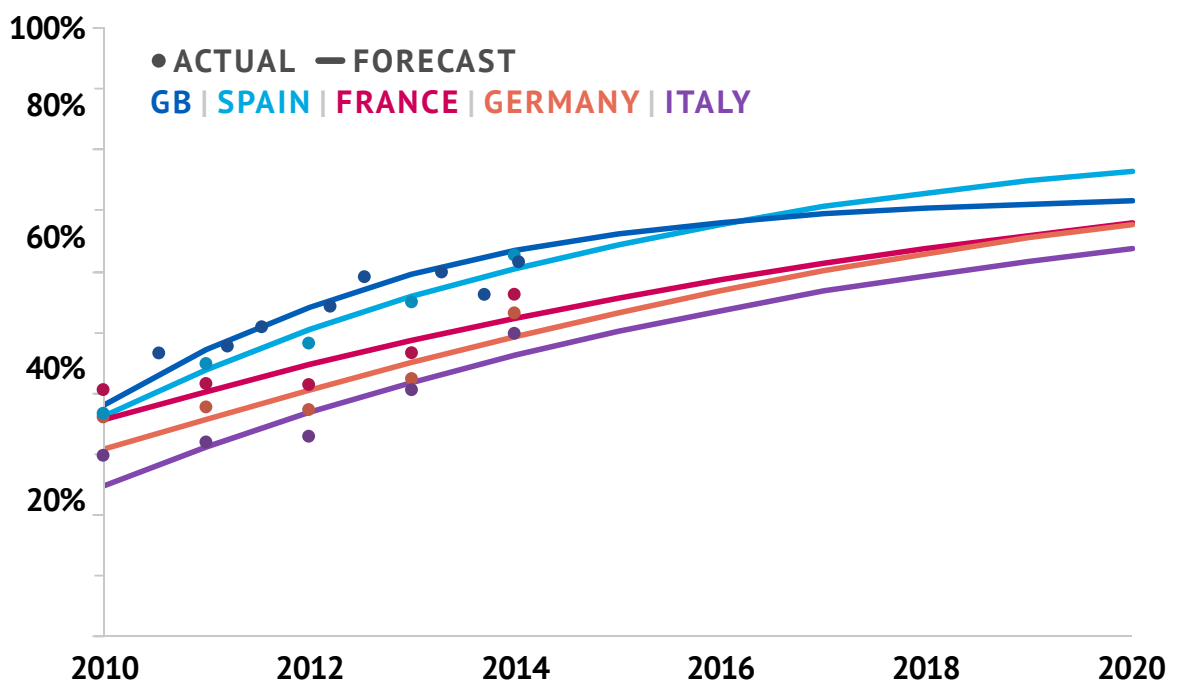
Social Capital Seekers will not only naturally structure their holiday activities and guide their behaviours with their online audiences in mind, but we can foresee a market for “clout-boosting breaks”, filled with consciously feed-friendly moments designed to help users “top-up” their network influence. This is an extreme example of a general truth for this tribe – a holiday is not entirely one’s own: it is made for sharing.

For Social Capital Seekers, always “half here, half there”, the journey doesn’t end when they touch down again on home soil. Part of the point of travel for this group is to reap the longer-term benefits of the experiences they have had. On one end of this scale, this will mean revisiting stored memories. On the other, this means basking in the adulation, like a rockstar returning from a world tour, of their followers back home. This tribe therefore, for all its novelty, takes in one of the most traditional travel tribes – those who make rites-of-passage. Many will travel for no other reason than “in order to have travelled”, or “in order to be well-travelled”.

DIRECTIONS FOR SOCIAL CAPITAL SEEKERS

Though there is and will remain a stubborn percentage of consumers, between 5 and 10 percent perhaps, who will resist the pull of social networking (and probably as much as possible technology), the logic of Enterprise Networking will punish this choice more and more strongly.

% WHO USE SOCIAL NETWORKING SITES IN THE LAST SIX MONTHS
JULY 2014 NVISION FORECAST



Source: nVision Research | Base: 1,000-1,400 face-to-face and 2,000-5,000 online respondents aged 16+, GB

Across global markets, the proportion of social networkers is beginning to plateau at between the 70 and 80% mark. This does not take into account, however, the frequency of social networking, which will no longer become a more “ambient” aspect of consumer lives. Though it may not make dramatic inroads amongst new audiences in the way that we can expect new consumer technologies to, it will penetrate their lives more deeply.

TRAVEL BEHAVIOURS AND NEEDS

Inspiration and booking

Peer-validated decision-making. There is a clear tendency amongst this tribe to trust real people’s statements over sales pitches from travel agencies. Decision making will be validated, or even outsourced entirely, to an online electorate. “Trendy” destinations will be preferred. “Bucket lists” will be consciously or unconsciously crowdsourced.

“In the past, every time I came home from a holiday I used to upload all my photos onto Facebook but now there is that instant gratification of loading a photo moments after taking it. It almost validates the experience that I am having in the present moment.”

Leisure Traveller, Australia

Social Capital Seeker Travel Choice

Travel firms are increasingly opening their social media channels to new kinds of contact with customers beyond broadcasting news and managing complaints.

#TweetStay, the latest venture from the travel-sector bargaining platform **Stayful**, allows prospective travellers to outsource their discount-seeking to Stayful travel experts, contactable through Twitter.



Customers simply tweet @Stayful, specifying where and when within the next 30 days they plan to leave, how much they want to pay, and for how long they will be visiting. The Stayful concierge then negotiates with boutique hotels and returns with special offers. Stayful can guarantee superior prices because they work in real-time; hotels are able to fill otherwise unoccupied rooms at short notice.

For this tribe, reaching travel providers through intermediary services integrated into social media platforms, which may well be widespread by 2030, will not only be a powerfully convenient and natural option, but would also let them parade their travel plans to their eavesdropping networks (without, perhaps, seeming explicitly to do so).

Loews Hotel also lets customers book rooms through **Twitter** using the hashtag #bookloews, **Conrad Hotels** visitors can book through **Instagram**, and airline **KLM**’s Facebook and Twitter followers can book, change or cancel a flight by sending over details through social media platforms.

Social media booking agents. Travel agents will go social. Third-party expert researchers will be a common conduit to purchase.

Strong brand presences. Social Capital Seekers will assume that leisure providers, hotels and activity designers have a social media presence. Brand representatives will need to be trained and equipped to handle price negotiations, cross-sell, respond to complaints and generally to communicate in ways appropriate to the contexts at play (including the specific languages associated with each social media platform). Responses will be expected to be instantaneous. By 2013 already 20% of consumers in the United Kingdom expected a response to an enquiry or complaint within an hour.¹⁰

At the airport

Feed-friendly experiences. This represents a whole new paradigm for travel, and is the most important and challenging thing for travel brands to get right for Social Capital Seekers. This applies throughout the journey (though the airport and hotel are particularly loaded with opportunity). Social content is at an age of content overload and time-crunch has come to be synonymous with short-lived, witty, quirky, colourful and exceptional moments. The most important thing that travel brands can do for this tribe is a) to curate such moments, and b) invite customers to move between social media and physical spaces seamlessly to capture and promote these moments. This will be a form of concierge service.

Social Capital Seekers may be particularly open to luxury offerings (a la “Rich Kids of Instagram”), but for travellers across the full price spectrum, appetite will be ravenous for moments of shareable wish-fulfillment.

Establishing ROC. Customers will not engage for free. There will be no stigma attached to filling a friend’s social feed with commissioned images and product recommendations, but social capital rentiers will ask for valuable, personal and imaginative returns on their investment.

Moreover, they will understand that their online endorsements are valuable, and will expect reward from brands. They will expect their networked influence to command better deals, upgrades, cashback, discounts on fares and reduced prices in duty-free stores, early-bird access, VIP services. They will favour direct (fare reductions, cashback) over indirect (discounts, perks) forms of remuneration, unless this reward is particularly imaginative and, in itself, network-enhancing (producing an ideal feedback loop from brand to consumer).

Everywhere connectivity. They will be attached to devices, with an eye on what is happening (and how their adventures are being followed) back home. The basic precondition of this behaviour is connectivity. Wi-Fi must be easy to access anywhere, it must be affordable or free, and it must allow sufficient bandwidth to post without delay multimedia files and messages.

Integrating social media with tech touchpoints. “Geonetworking” (popularised by Foursquare, now integrated into most platforms) means that while a user might pass through check-in only once, while at the airport they will “check-in” to many locations online. Tech touchpoints and paypoints along the journey - retail stores, restaurants, digital maps and flightboards should allow users to share their activity with their networks.

On arrival and at destination

Co-creation. A cultural artefact is not something to be treated with silent reverence. Personalisation will be expected of cabin options, hotel rooms, forms of entertainment and diversion, structured experiences. More broadly, this tribe will volunteer their feedback willingly, but expect to see complaints and recommendations to brands result in visible change.

In review

Tangible and shareable journey outputs. In many ways, this is where travel begins to pay off for Social Capital Seekers. Behind this fact is a recognition that travel has “functional benefits” that carry over into the life of the traveller. All experiences must have tangible and shareable outputs. This could mean providing “highlight reels” from trips, or other attention-grabbing, aesthetically-pleasing souvenirs. In the abstract, the ideal will be for the traveller to have enhanced the range and strength of his social signal upon his return. The success of the holiday will be made or broken on this.

Social Capital Seeker Travel Choice

For this tribe, a selfie is never inappropriate.

The **Mandarin Oriental Paris** rewards such selfie-centred guests with a private tour of the locations in the French capital cherry-picked for their Instagram-worthiness. Guests are given a complete list of the most scenic and photogenic locations in Paris. While riding from one selfie spot to the next in the chauffeured car, guests can post their photos online thanks to the vehicle’s on-board Wi-Fi. Complimentary Wi-Fi is also offered in the hotel room.



At the end of each month from October to January, the hotel manager will select the best selfie posted with these tags. The winning photographer will receive a free one-night stay at the Parisian hotel.

This represents the latest manifestation of a micro-trend developed by a number of independent hotels worldwide. The **La Concha Resort** in San Juan, Puerto Rico, offered last year a “**Take a Selfie Adventure**” package, including discounts at the **Bacardi** Distillery, a Tropical Rain Forest Tour, and kite flying at historical forts – escapades designed as fuel for smartphone cam trigger fingers. The **1888 Hotel** in Sydney, Australia (its name a homage to the year of Kodak’s debut box and roll camera) took this one step further in 2013, designing its entire space, and decorating it with empty and hanging gilt frames, as a playground for Instagrammers.

PEN PORTRAIT

Fionnula, 20, Irish, on her second gap year

Fionnula is lying on the grass in St. Anne’s Park, Dublin, on an unusually hot weekend in April, thinking about how to boost her online following. Looking out over the Duck Pond, with the beautiful follies around, she gets the hazy sense that there is something nice, maybe Mediterranean-like, about this afternoon, something she can’t put her finger on.

She takes a photo, and tags it with a temperature and atmospheric reading from sensors embedded in her smartphone. She sends the Instagram to the account of @SenseMatchTravel with a budget range and consent to use her social media

data in forming a response, and within the hour she receives a reply with three envelopes, each containing a heavily-discounted personalised offer based on the service's interpretation of her Instagram photo, as well as gleanings from her list of followers, her likes, her recent listening... Amused, she creates a poll on the social media site where her best-travelled friends hang out. "Which one should I pick?"

She gets an unusually large response – her social media analytics tell her that this post received 50% more clicks and 60% more likes than anything she has shared in the past 12 months. Maybe this deal is worth a closer look...

A few days later and Fionnula is snapping a selfie by at the Temple of Isis at Pompeii, pretending to prop up a column, and her feed is ablaze. She had set the lifelogging device around her neck to 24/7 record from the moment she arrived, and her stream is steadily attracting growing numbers of viewers. Subscribers are also sent an automatically-edited highlights-reel from her day, based on her check-ins at beacons at areas of interest, detection of noise levels and tracking of her heart rate and cortisone levels.

She is sure to fill her days with beautiful sights and quirky attractions from her area, and barely takes a moment's rest. On one day she uses a geolocation function within her social app to locate other social influencers in the area. She goes to the beach with one popular vlogger from the area – they both know that two famous faces in a video are better than one. She spends her evenings managing her feeds and producing a daily vlog.

When she returns home, she receives a number of messages through her professional social network from travel brands inviting her to visit Naples, Genoa, Sicily... next time, and enjoy discounts and VIP services.



GETTING TO KNOW REWARD HUNTERS

INTRODUCTION

As awareness deepens amongst the global citizenry that urbanisation, increasing working hours, solitary living and technological dependency all contribute to us giving more of ourselves in our day-to-day lives, the thirst for 'reward' from travel will grow.

The experience of the Reward Hunters ties into a broader trend in what many now ask for from their leisure. Many have come to crave something that represents a reward experience, a return on their hard earned investment in the office or their day-to-day lives. A premium is set on extraordinary 'must have' experiences which promise to help us understand ourselves better, stimulate ourselves mentally, build ourselves physically and, ultimately enjoy the very highest standards of travel and hospitality the world has to offer.

This could be wellness-driven such as incorporating a high-end spa experience as part of a mini or City break. But it could also be something much more spectacular and different such as flying by private helicopter to a music concert which happens to be taking place in a different country tonight. The trip would involve not only sourcing the tickets, long sold-out, but also curating the 'one-off' experience because the time, money and access to this type of travel is available, and is seen as recompense for the daily grind of modern life.

To describe it as a premium is appropriate. The Reward Hunter will be the energising audience for innovation in luxury travel over the next 15 years. For a tribe of fitness-conscious, high net worth and efficiency-oriented future citizens, sanctioned periods of indulgence or healthy hedonism – of which the best example is the indulgent spa-based mini-break - will be the ultimate reward for hanging on in there through a stressful, executive working week. Travel will be seen as the well-deserved but frequent treat or even the gateway to life-affirming experiences than transcend the every day routine.



As more people in developed markets decide to opt-out of classic family life in favour of the pursuit of careers or wealth, there becomes increased time to focus on balancing the stresses of high achievement. Reward will manifest itself in different forms for different people; we can expect this tribe to seek out wellness experiences dedicated solely to their own relaxation and self-improvement alongside hedonistic excess and extreme self-indulgence, whether gastronomic or party-fuelled.

Affluent, globally-aware, refined in their tastes... destination, for these travellers, takes a distinct backseat to experience. Atmospheric environments equal good vibes, and these are commodities which will be increasingly at a premium as cities grow, rural communities disband and untouched regions are opened up to global capitalism. The Cult of Wellness is already strongly associated with a nouveau luxury fashionable in developed markets, spurning material for immaterial gain, and we expect this association to strengthen further in coming years.

DIRECTIONS FOR REWARD HUNTERS

“Flying to London only for a party will not be an exception by 2030 – at least not for people with a good income and who feel they have worked for it.”

Trendspotter, Germany

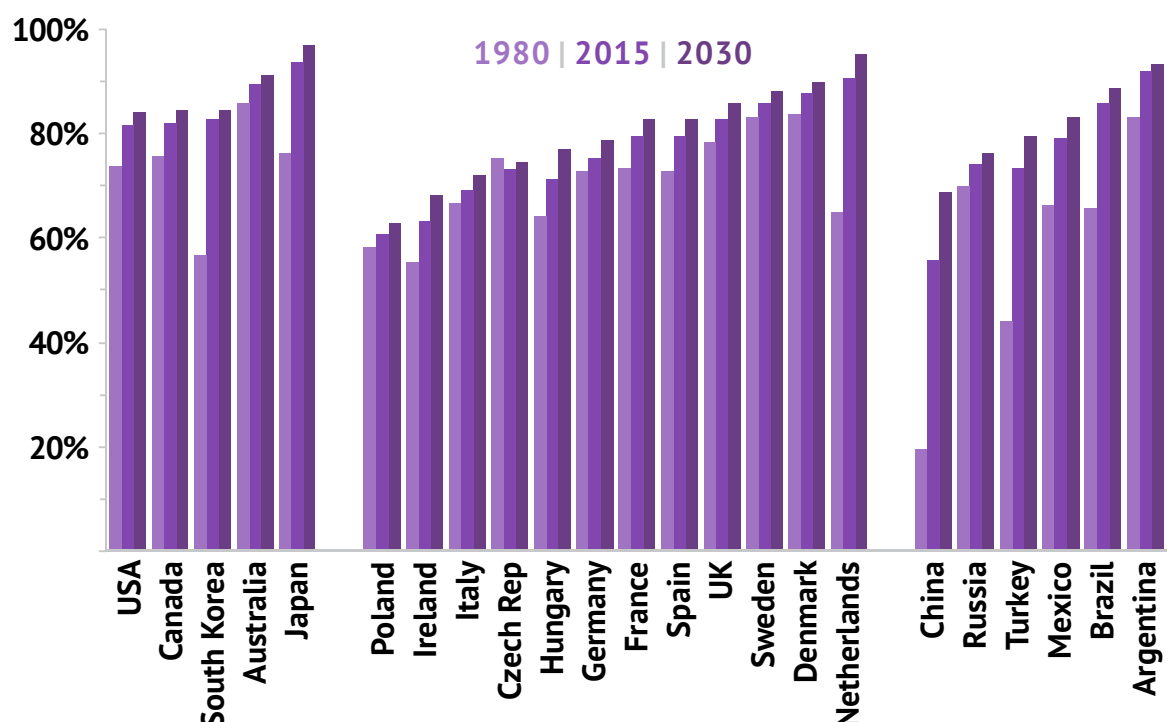
Driven by singleton societies. Single households are growing in number across the globe. By 2030, they will represent 20% of households worldwide. Already in Western Europe over 30% of households are composed of singletons.¹¹ Additionally, people who do live with family often struggle to find a time when everyone is free to travel.

“Solo travel is growing, especially amongst the younger crowd and those who are looking to discover themselves, think ‘Eat, Pray Love’. This will be more prevalent among women than men who are looking for self-development.”

Travel Agent, Australia

Urbanisation. By 2035, 86.5% of the world’s population will be urban.¹² If we assume that cities are built and grow along similar lines as they have up to now, demand for occasional escape and rejuvenation will necessarily grow.

% OF POPULATION RESIDING IN URBAN AREAS | UNITED NATIONS PROJECTIONS RELEASED IN JUNE 2014



Murdered by modernity. For all enthusiastic uptake of new technologies, and all faith that coming Digital Revolutions will represent a glorious revolution in human opportunity, anti-technological sentiment exists, and the worries of modern living evoke a sense of nostalgia and longing for a simpler, low-technology past. Consumer groups worldwide are entirely capable of holding these seemingly contradictory values.

In 2013, 65% of global consumers on average agreed with the statement “the stresses of modern life mean that people are less happy than they used to be”. By 2014, this had increased to 72%.¹³ This sentiment may drive desire for “unplugged” holiday experiences.

Enabled by inequality. As the concentration of wealth continues in both developed and emerging markets, there will be an evergrowing cadre of super-wealthy with the resources to pursue their travel reward goals. According to the OECD, the average income of the richest 10% of the population is about nine times that of the poorest 10%, up from seven times 25 years ago across member nations. Most forecasts suggest this trend will continue until 2030 without radical intervention.

TRAVEL BEHAVIOURS AND NEEDS

Inspiration and booking

Concierge search. Because this tribe’s ideal travel experience is focused around having earned the right to indulge, they want very little to no personal effort to be expended creating the experience. We can expect a greater reliance on concierge services, personal assistants and outsourced travel management from ‘fixers’ that are able to just make it happen at the drop of a hat. The rise of businesses such as Quintessentially are enabling larger numbers of people to access concierge services today and with turnover growing at circa 20%, demand seems strong.

At the airport

VIP living. Much of what drives the Reward Hunter is the indulgence of being unique, having an experience others do not. At the airport this is likely to result in an increasing drive toward VIP experiences, being taken directly to the aircraft, without the check-in, baggage or security process and accompanied by a personal escort. This tribe will seek to mimic the treatment politicians and royalty experience when at the airport today, by-passing the standard processes most are familiar with.

In flight

Zero-connectivity zones. As we explain below, wellness-oriented holidaymaking does not necessarily rule out the selective-application of tech-driven efficiencies. The Reward Hunter is not strictly looking for a “Digital Detox” experience throughout their travel. However, they are likely to demand sophisticated demarcation of “zones” in which technology appears to play little part in their journey. In-flight may be one such restive space in which the advantages of constant connectivity are not so readily apparent and the flier has an opportunity to indulge in quieter activity.

Uber Comfort. Reward Hunters are likely to seek first-class experiences, open to the increasing sophistication of airline offers for in-flight products such as spa treatments, gym usage and flatbeds.

On arrival and at destination

Spa on arrival. For all its new efficiencies and amenities, long-haul air travel will continue to carry its stresses and discomforts. These will be felt particularly acutely by Reward Hunters. Spas and fitness studios will spring up at various points in the consumer journey, be it post-check-in in customer lounges, or immediately on arrival, offering jetlag remedies and recirculation treatments. The “spa-on-arrival” develops into a mainstream, even potentially complimentary, offering first for VIPs, and then more broadly.

Reward Hunter Tech Choice

Later this year, **Zano Drones** will launch to a select group of 4,000 consumers lucky enough to have registered and purchased one of the first batch. These drones take photos and HD videos of people from the air, syncing to the traveller's iPhone or Android device in order to be able to capture special or active moments such as skiing or water sports. Reward Hunters are likely to be early adopters of such innovative, but premium-priced technology.



In review

Outputs. Reward Hunters travel in order to return in some way improved and to satisfy their feeling of 'I've earned it'. In this respect they are similar to Social Capital Seekers. However, the outputs they will demand will be less tangible than those of Social Capital Seekers – a temporary feeling of serenity, the impression of having experienced something completely unique and memorable, a story to tell of the inner and outer beauty they have encountered. This will be enough for many. For those Reward Hunters likely to parade their newfound sense of wellbeing on online networks, personalised and shareable souvenirs – records of their mental and spiritual achievements – could be offered by accommodation sites or even at airports.

PREFERRED TECH

The Reward Hunters will have a complex relationship with technology. On the one hand, their purpose for travel will be linked to the anxieties and disaffections generated by so much fast-paced, often digital living. They may treat their holidays as a "Digital Detox", going against the general trend by choosing destinations on the basis not of how much connectivity they offer, but how little. But on the other hand, if technology can deliver new hedonistic and indulgent personal experiences which are deemed unattainable by the masses or unique, then they will be quick to adopt it.

Quantified Self systems. The Quantified Self, movement to incorporate personal data measured from all aspects of daily life in the quest for better health and more efficient time-use, has been much discussed since the term was coined in 2011. Usage of apps designed to measure calories, however, have remained niche (9% on average globally as of 2014). Some commentators have dismissed the activity as a passing fad. Reward Hunters may be a group - time-poor, health-conscious, proactive, affluent – amongst which such systems have serious appeal.

We can expect to see the collapse of some of the barriers blocking the proliferation of health-tracking behaviour in the coming years. When coupled with wearable technologies, which will cut down the degree of cumbersome manual input still required to extract any value from this activity, general users will find it much easier to extract meaningful, personally-relevant insight from their life-logging without having to pour over charts and statistics. Certainly, health-diarism and wellbeing-tracking will be at the centre of how the lives and breaks of Reward Hunters will be managed.

“ The internet is providing opportunities for people to express their love for unusual things and these people, who are passionate about what they do/make/create/love/ worship, are connecting more and more online. Travel is the next step for them – groups from all over the world meeting up to explore the passion they share. ”

Trendspotter, Spain

Reward Hunter Tech Choice

Headspace is a Quantified Self app for the contemplatively-inclined.

The app promises to help you “treat your head right” with a range of tools designed to schedule and guide everyday meditation and mindfulness. Furthermore the app provides feedback on your incremental journey to personal enlightenment.

Subscribers have access to hundreds of hours of motivational content which learns your priorities and anxieties, whether it be stress-reduction, creativity-augmenting, relationship-building or happiness-seeking, and the app provides regular feedback on your path to inner peace.



Biometric ID. Reward Hunters will be pathbreakers when it comes to biometric data-sharing, and will drive demand for physiological forms of identification. Not only will they understand that biometric solutions will improve check-in times, all the while allowing them to go “paperless”, but the fact that they habitually track their fitness data will help them to overcome a “squeamishness” over the brand use of their real-time vital signals, which may inhibit the consumer reception of what is already a technologically-advanced and relatively effective form of personal identification.

PEN PORTRAIT

Celine, 60, French, Business Executive

Celine is an entrepreneur who has recently sold a successful business and continues to consult in her chosen field of financial services; she is also a member of a luxury travel club. What began as a way to inject some tranquillity into her ever-hectic, jet-setting working week, evolved into what she and her new friends jokingly refer to as a “cult”, informing every aspect of her travel, and providing her with a way of experiencing the most indulgent and self-centred activities the world has to offer. After all she’s earned it.

A few years ago, a retreat opened in the Huayhuash cordillera in Peru, set in stunning landscape only selectively opened up to tourists. It commands a high premium as a result, but Celine feels it is worth it. Her total-life-tracking app, weighing up the volume of her work commitments, her stress levels, her sleeping patterns, pops up with a notification one Thursday afternoon: “Tough week? You have a free weekend ahead (is that correct?). Peru?” She confirms that that is correct to her knowledge, she contacts her personal concierge service, outlines her requirements and they book her usual first-class overnight flight for the next day, to arrive on Saturday morning.

Skippping the normal baggage and check-in processes, she meets her airline VIP personal escort in the lounge who arranges for her to proceed to security. She shares her bio-ID, naturally, which lets her pass through security as quickly as

possible using a password encoded from real-time heartbeat data, the maximally-“invasive” but minimally time-consuming option for travellers. The data also helps the physiotherapists in the first-class wellness spa to understand her pressure points (and to know to be careful of her collarbone – she’s still fragile after a clavicle fracture last year) when applying her complimentary de-stressing “departure massage” after check-in. She takes a spacious seating option and arranges to take a light meal, but opts out of any entertainment options.

During the flight, she tells her wellness app to monitor her sleep, lies in the foetal position and watches the window-display projecting an enhanced image of a perfect skyscape. She sleeps.

She touches down at a small airport 3 miles from the retreat as the crow flies. Her concierge has arranged for a luxury limousine to collect her directly from the rear of the airport where the VIP travellers are able to exit smoothly and quickly. Her baggage is automatically shipped to her hotel.

When she arrives, she is greeted by a staff-member who knows her (and without the need of any sycophantic gadgetry!) by name, sets her up with her complimentary foot rub and takes her to her room, with all her settings – lighting, climate, preferred water temperature – pre-installed. She sets her smartwatch to “ambient” – with tracking enabled, but no notifications from the outside world, except from pre-specified contacts and only in emergencies – and prepares to unwind.

Feeling “locked in” to a tariff gives seriously bad vibes – all talk of the vulgar world of money and business is strictly taboo and is left at the door, so she pays cashlessly as she consumes by scanning her smartband against connected hotspots, such as the entrance to the sauna. Whilst at the retreat, Celine undertakes a ‘full diagnostic’ scan from the registered on-site doctor to ensure she is completely fit and healthy; fortunately she passes with flying colours.

After her medical assessment, Celine decides to take a helicopter trip to a nearby mountain, where she disembarks with her personal drone. The drone is able to capture her sightseeing and relay the images back to her personal cloud. On the way back to the retreat, she calls her concierge and asks for some travel options for next month, when she prefers gastronomic indulgence and to sample the five top Michelin-starred restaurants in Europe.



GETTING TO KNOW OBLIGATION MEETERS

INTRODUCTION

The tribes described so far have had what can be called “soft” travel objectives – such as enjoyment, relaxation, skill-acquisition and to an extent popularity-building, but a significant proportion of flights will be made necessary or desirable by “hard” objectives – to meet this client, to attend this seminar, to have this surgical procedure surgery, to shop at this store, to be at this event, to catch up with this person.

These objectives place important limitations on the choices Obligation Meeters have for their travel. They will almost invariably specify times and dates of travel. They might place specific restrictions on budget and payment methods.

Key obligated groups include:

- Business travellers
- MICE (Meetings, Incentives, Conferences, Exhibitions) travel
- Football/sports events
- Dual-citizens
- Visiting Friends and Relatives (VFR)
- Personal/familial occasions/events
- Health Tourists
- “Bucket list” tourists
- Pilgrims
- Students (e.g. attending conferences and seminars, or on short-term study grants)



Obligation Meeter Tech Choice

Microsoft's new **Surface Hub** design, demoed in January 2015, adds a range of innovative functionalities to an 84-inch, 4K, multitouch display, and gestures towards the future of conferencing technologies. The technology comprises a teleconferencing apparatus, including multiple cameras and motions sensors, a digital whiteboard for planning and brainstorming sessions, and seamless integration with a range of Windows programmes. Microsoft also says users can join a Surface Hub meeting with just one click, eliminating the need for employees to dial in with special codes.



Technologies of this level of sophistication will be prohibitively expensive for many businesses in the near-future, but could be a mainstream reality by 2030. Business travel is threatened.

DIRECTIONS FOR OBLIGATION MEETERS

Changing working patterns. A decline in fixed-hour jobs, the growth of flexible working arrangements, a global culture of entrepreneurialism, omnipresent connectivity... these changes, already operant in developed markets, will dislodge the office from the centre of the working lives of millions and prompt a boom in international commuting and roaming work. The line between discretionary and essential is blurring. “Bleasure” itself brings the concept of needing to travel under strain.

The death of tourism, the rise of events. Planners worldwide are changing their views of how to extract maximum economic benefits from incoming travellers. Funding is migrating from tourism spend, and towards events and festival spend. Focus on experience over destination is a powerful growth driver for Cultural Purists and Reward Hunters, but it also has significant implications for Obligation Meeters. Tourism comes to mean hard goals over soft. Many will see cultural enlightenment in celebrating the ethno-religious and national holidays of non-native societies, seeking out specific events to attend rather than pursuing a less scripted approach to tourism.

Remote conferencing. Recent years have seen teleconferencing rise in popularity in business communities, and this may continue to grow, driven by Moore’s Law, economies of scale, cloud computing and creative innovations in this area. This will denecessitate business travel to a limited extent. Though cultures and corporations differ in their rules of engagement, business etiquette for many will make face-to-face interaction with clients and colleagues essential.

TRAVEL BEHAVIOURS AND NEEDS

Booking

Holistic booking systems. Obligation Meeters will favour a no-hassle, choice-minimal approach to booking flights, and will be receptive to the intelligent cross-selling of linked transport, accommodation and services in certain circumstances. Booking systems will need to flexibly adapt between “expensed” accounts and their own for spending. Booking systems that can also offer a chance for a more relaxed leisure ‘bolt-on’ will be welcomed by many, particularly those obligated by business that may wish to attach a short break or destination experience for themselves.

Tailored and efficient agency interactions. This tribe is focused on their objective and any advice, service or information that helps will be welcome. In this context, Travel Management Companies and consultants that are able to leverage new technology to help Obligation Meeters stay 'a step ahead' will thrive. For example, TMCs that can initiate a quick online video chat session with an Obligation Meeter that has been disrupted or an agent that can use intuitive search techniques to "cut through the noise" of travel options across different modes of travel.

Advance booking. For certain sub-groups of Obligation Meeters, it will be necessary to book long in advance of travel, for example in advance of religious festivals, pilgrimages and significant familial events.

At the airport

Time-saving and reassuring check-in options. Making check-in simpler is in itself simple. By 2030, advanced forms of technology will exist making large claims in this area, but already systems exist, though they are not widely used, which will reduce waiting time and communicate with passengers when things go wrong. Push messaging to proprietary airport apps, or even old-fashioned texts, will be vehicles to help Obligation Meeters know where they need to be precisely when, reducing waiting time, and "paperless" boarding will quickly become mainstream. Boarding might, in 2030, be as simple as presenting a smartwatch, or even displaying the vein pattern in your wrist, to a smart sensor.

Connected luggage, such as the BlueSmart Carry-On Bag, will be widely available and affordable, and rapidly adopted by Obligation Meeters. Smart suitcases will allow travellers to weigh their luggage without a scale, locate it when lost, and receive a notification to a companion app if it is accidentally left behind. Baggage will still be lost by air carriers, for example, in 2030, but simple and elegant solutions like this will provide reassurance and present the consumer with actionable next steps when this happens.

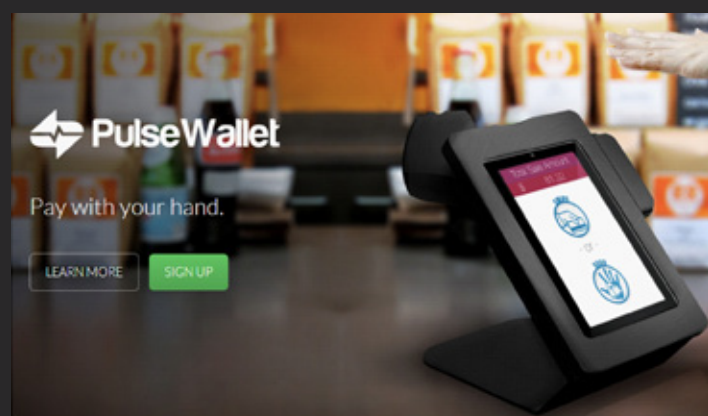
“It's easy to be distracted by Silicon Valley boosters going on about how consumer empowerment through IT is the future and that's it. What needs to happen first is for firms to cover some of the basics of customer service. When an airport closes down because of snow or atmospheric ash, do you think it actually bothers to send texts or emails to the people who have booked flights for that day?”

James Woudhuysen, Forecaster

Pulse Wallet is a system which lets you pay "with your hand". It works by using an infrared Fujitsu camera which photographs the vein pattern in your hand and then matches it to the credit card which you have registered.

The service is accompanied with an app which functions as a digital wallet, allowing users to review and track their transactions.

It is easy to envision applications for technology of this kind extending beyond payments. It could facilitate paperless boarding, secure check-in, or act as a key to lounges and other exclusive airport zones, lockers, etc.



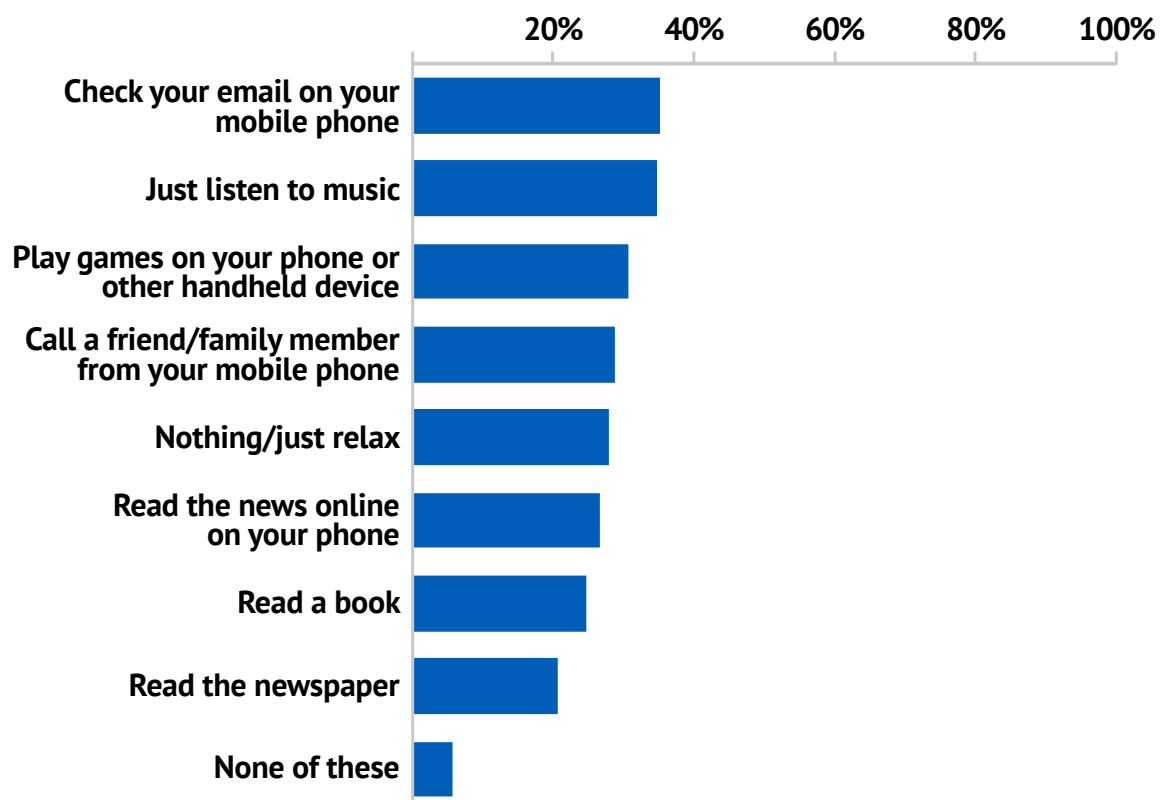
Fluid airport systems. Integrated airport and airline systems will increase the speed of passage through check-in, security checks and gates. No time will be spent waiting unnecessarily. Though roaming scheduling and transport management apps will allow travellers to improvise new arrangement when things go wrong and connections are missed, Obligation Meeters will often be on tight schedules and will have a low tolerance for delays.

Automated contingency planning. Flexible journey management. These contingencies will “activate” automatically once the system receives indication that the journey has been disrupted (by flight, baggage or linking transport delay/cancellation for example). This could entail automatically researching and booking alternative forms of transport, negotiating with transport providers for refunds or concessions, or simply contacting anyone affected by the delay. The criteria for making contingency plans will adapt to preferences and schedules. On some occasions, for example, business travellers on a tight schedule who miss their flight might be willing to take the sting of a more expensive alternative rather than opt for a less expensive but slower one.

Smart boredom. Obligation Meeters will often travel regularly, and spend much of their time in airports. To avoid frustration, airport processes can be made quicker, but the logistical complexity and security rigour needed in getting passengers from check-in to take-off means that flying will always involve, to some extent, waiting around. The onus is on airports then to convert this from a chore to a treat. For busy people, this “dead” time can be transformed into an efficient opportunity to work, shop and conduct other life business from the airport – for example we could envisage the development of banking or other consumer services at the airport.

Flexible baggage arrangements. Obligation Meeters will be frequent fliers, and will upgrade for concierge services allowing them to make these flights lighter and more quickly.

“WHEN YOU HAVE A SPARE 20 MINUTES WHILE OUT AND ABOUT E.G. WAITING FOR A BUS/TRAIN, WHICH OF THE FOLLOWING DO YOU DO?”
MEAN OF 28 MARKETS, AMONG ONLINE POPULATION | 2014



Obligation Meeter Service Choice

Packnada is a Singapore-based service which aims to relieve travellers of the stress and expense of packing bags and carrying luggage on regular travel.

Users of the service are invited to leave their luggage behind after checking out from their hotel. It will be dry cleaned, and hung in their own wardrobe ready to be worn on their next trip. Alternatively, the clothes can be delivered to the next destination where the traveller is expected. The price is \$99 per trip.

Concierge services of this kind, introducing new efficiencies into the journeys of premium clients, will proliferate in the coming years. At the moment, ideas of this kind are the signature of experimental, third-party start ups. It is foreseeable that hotel chains, inspired by the sharing economy, will bring these services in-house and innovate along these lines in the future.



Powerful connectivity. Network security will be of particular importance to this group. This will be one of the greatest challenges network technicians will face – how to offer Wi-Fi both easily accessible (without the need for by then archaic passwords) and scaled, but at the same time encrypted to standards suitable for the sensitive nature of the networked activity. Biometric security is an option here.

In flight

Automated payment flexibility. Business expenses will be recorded and reimbursed automatically. “Company time” will be carefully distinguished from leisure time. Travellers will want to keep track of spending in each at all times, but without any fiddly accountancy. The setting of spending limits, or systems which automatically select the appropriate payment channel according to certain criteria (size of spend, spending category, etc.) may be an option here. App-based cashless payment systems will be necessary here – the hassle of switching between debit cards will be an outdated concern. Time and money-saving, for some, will within companies be a gently competitive, gamified activity mediated through life-tracking apps.

Incentives for loyalty. One of the most powerful incentives for loyalty from this group will be the impact of so-called “network effects”. Data systems become more powerful and efficient the more input they receive. Frequent flyers will be incentivised to use the same airlines as carriers will develop an ever more nuanced intuition of the flyer’s preferences. Switching airlines will have punitive effects – proactive messaging and tailoring of services will be more approximate. Future flyers will understand this dynamic, and this may encourage them to data share.

“ As the content we share, for pleasure but particularly for business, is generally more and more multimedia, this will create serious challenges for broadband providers. It won't just be that by 2030 the world is flawlessly networked. People now select the places where they live, work and stay by the ease, security and speed of the available connection. ”

Ian Yeoman, Travel and Tourism Futurologist

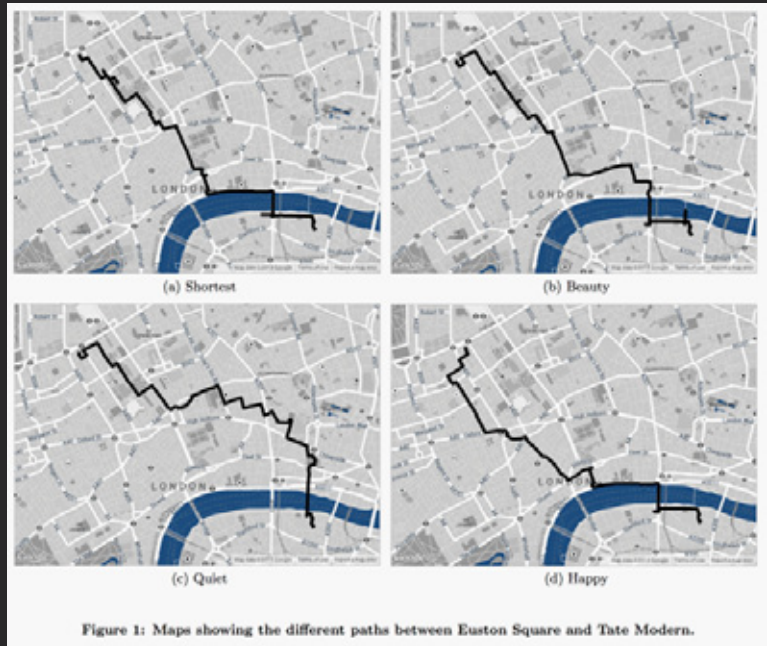
On arrival and at destination

Better bleasure. Though Obligation Meeters will travel with some central objective, they will plan or perhaps more likely improvise leisure around this central objective.

PREFERRED TECH

Obligation Meeter Tech Choice

Scientists at [Yahoo Labs](#) in Barcelona have developed an algorithm for ranking map routes based upon different metrics such as beauty, happiness, shortest and quietest. Technology like this would allow future business travellers to carefully weigh working needs, efficiency, reliability, speed of travel, against other ambitions for travel in a nuanced way. No longer is a path either as the crow flies or the scenic route.



PEN PORTRAIT

Seonyeon, 26, South Korean, PR Manager

Seonyeon decides to earn some brownie points with her new client by attending the meeting in person – the teleconferencing system in the office is good, but it is no substitute for a face-to-face conversation as a starting point for partnership. She knows the procedure by now. She logs into her mobile workplace app – which keeps her timesheet, contains a messaging hub just for the employees at her office, currently scattered all over Asia on business, and allows her to track and validate expenses with her office manager – to log her engagement, and is soon messaged by an online travel agent with the best deal within the automatically allocated budget, and takes her through the standard customisable features and contingencies.

She is allocated a hotel room close to the airport, which she feels is a shame as she has never seen much of Tianjin. She decides to use some of her vacation allowance and improvise a half-day excursion around the city. But not until the meeting is out of the way – she could never enjoy herself with that on her mind.

The app maps out the quickest route to the airport, which happens to be by train, but she scales up the “scenic” coefficient for the return journey, and contracts a service to deliver her car to the airport on her return – she likes to drive, and one rarely has time to these days.

A few hours before her flight, a severe weather warning stalls all flights from the airport. She receives a notification, with details of the contingency plan. She is irritated, and worried about her punctuality but by way of an apology for the inconvenience she is put on the first plane taking off when the weather clears, her seat upgraded with more leg room, and her contact notified at intervals of her progress. As it happens, she is not too late, and her client is sympathetic.

She spends the waiting time working on the airport Wi-Fi and shopping at unmanned duty-free stores. She creates and selects a scent using an olfactory sensing interface, builds a model of a bottle to be 3D printed, and sends it to be delivered on the morning of her daughter’s birthday next week, paying with a swipe of her smartphone.

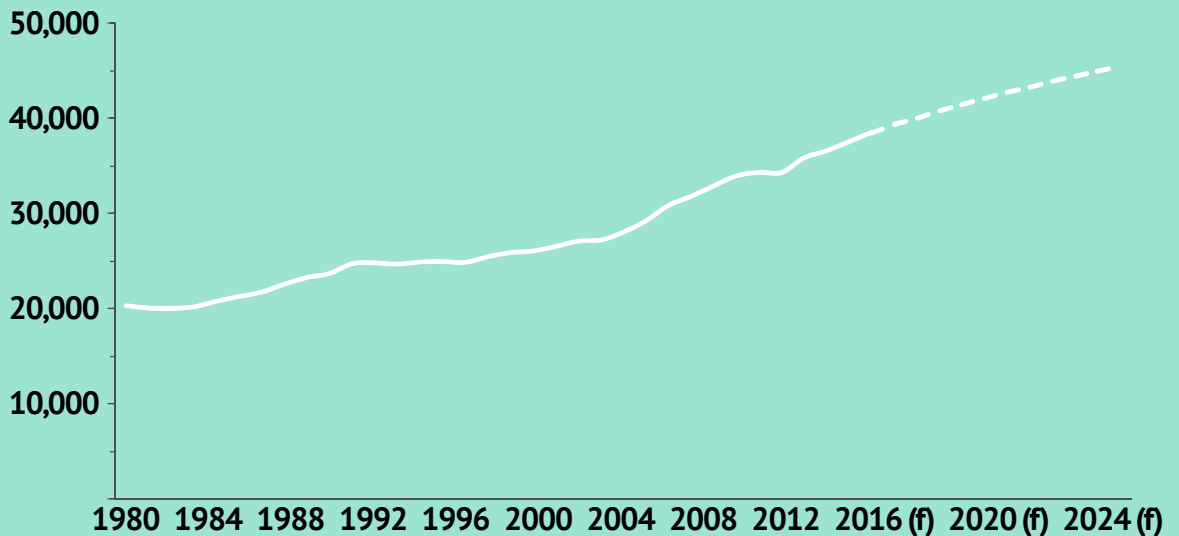


GETTING TO KNOW ETHICAL TRAVELLERS

INTRODUCTION

The current state of the climate debate is reliably indicative of its future direction only in that it is a highly contentious and polarising matter. It is possible that, in 2030, some consumers may avoid particular airlines, even air travel entirely, because they are concerned about anthropogenic climate change and the state of the planet.

GLOBAL CARBON EMISSIONS: TREND AND FORECAST
MILLIONS OF TONNES OF OIL EQUIVALENT
OXFORD ECONOMICS FORECAST, AUGUST 2014 PROJECTION



Source: Oxford Economics/nVision, 2014



Many more will change their travel behaviours in some way so as to make some kind of concession to their conscience. They may worry about their carbon footprint, taking the attitude that if they cannot offset they may not set off. Or more likely they will look to make low-scale alterations to their behaviours, cutting down on luxuries leaving unchanged core habits and patterns. Very few will make some ethical objective the exclusive goal of their travel, but many will look to build or improvise some element of volunteering, community development or eco-sustainable activity into their holidays.

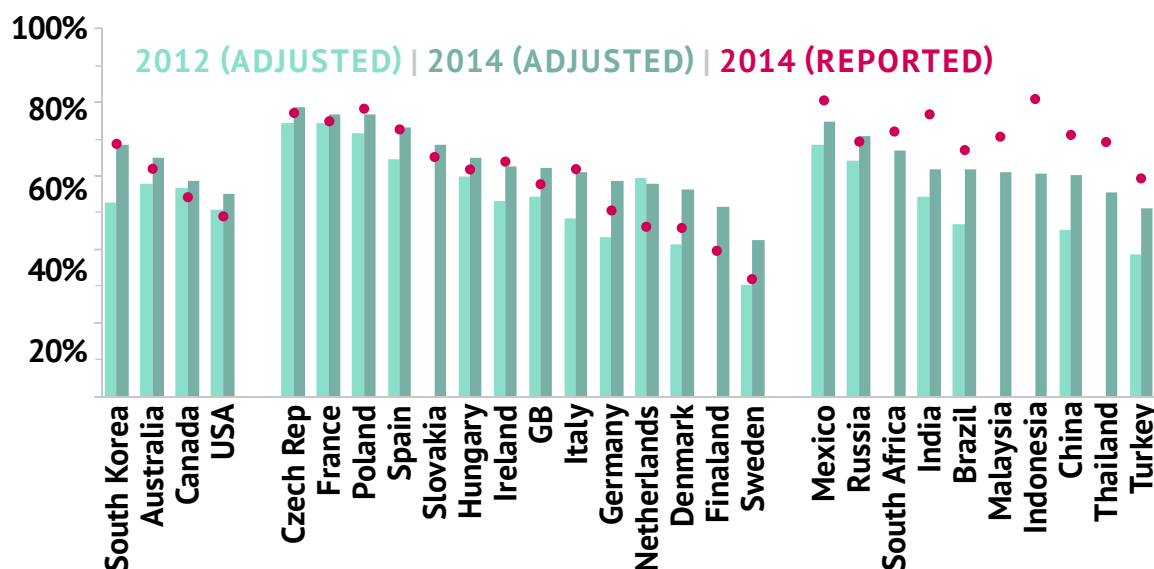
We may see cultivated more widely the goal to bring our individual impacts on the world, political and environmental, as close to “neutral” as possible. The quantification of the karmic, available on every future portable device, will give recommendations as to how to do this, and feedback on our progress towards the eradication of our footprint. For airlines, this future is vastly more attractive than the one where we take off our shoes entirely.

Ethical travel of the future will differ in important respects from that of the past. In the era of increased Corporate Social Responsibility, demands for greater behind-the-scenes access and accountability from big business, increased pressure to demonstrate tangible results of corporate ethical claims, and the consumer desire for some kind of reward for their ethical choices will come from some segments of the population, and will be particularly important in ensuring the goodwill of Ethical Travellers.

This latter point is particularly important. In addition to a general sense of wanting to “do good”, more professionalised forms of giving are emerging, and consumers may expect their morality to be acknowledged by friendship networks, future employers and, of course, brands, although they won’t depend on it. Moreover, they may not accept that ethical choices must come with sacrifice – instead this tribe may actually believe they will come with some element of reward.

The operant ethical principles amongst this tribe are not only environmental. Others may be more powerful. They may avoid flashpoints of geopolitical conflict or countries governed by disagreeable regimes. They will understand that tourism boosts economies, and plan their travels with an investor or an altruist’s attention to the impact of their dollars. They may opt out of the big travel ecosystem to make sure that tourist spend is pumped directly into local economies, or direct their spend towards emerging rather than developed markets.

“HOW STRONGLY DO YOU AGREE OR DISAGREE? COMPANIES SHOULD CONCENTRATE ON GIVING VALUE-FOR-MONEY AND GOOD SERVICE TO THEIR CUSTOMERS - AND MINIMISE THEIR SOCIAL RESPONSIBILITY ACTIVITIES”
% WHO AGREE OR AGREE STRONGLY, REPORTED & ADJUSTED DATA | 2014



Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia, Mexico & S. Africa 16-54), 2014

DIRECTIONS FOR ETHICAL TRAVELLERS

Contingency on economic circumstances. The movement towards more ethically-motivated decision-making is both a linear process, broadly parallel to the development of economies, and a cyclical one highly dependent on prevailing economic circumstances and the movement of emerging economies. The fact in itself that the concerns of so many are contingent rather than absolute suggests that they might be alleviated by sensitive brand messaging and action.

New “goods”. The shape of this tribe will change as new global antagonisms produce new moral causes. For example, the emerging data economy will certainly prompt ethically-motivated consumer rights campaigning, and may indirectly steer travel behaviours – consumer avoidance of airliners with non-transparent or overzealous data collection policies will come as much from a place of civic concern as privacy-squeamishness. It is possible that meeting demands for a transparent and fair system here would be equally damaging to airliner margins in a highly competitive data economy as would reforming systems along greener lines.

TRAVEL BEHAVIOURS AND NEEDS

Research and booking

Virtual alternatives. Virtual Reality simulations such as Oculus Rift, as discussed in the opening section, are unlikely to advance by 2030 to the stage of being entirely persuasive, and even if this were the case, do not necessarily cater to the fundamental impulse to explore. However, amongst those looking to reign in this impulse for ethical reasons, they may represent a desirable alternative. Their appeal goes beyond the appeal of not flying. They may use them to “visit” places to which, for political reasons, are otherwise inaccessible or unsafe, or to explore areas of fascination without contributing their tourist dollars to economies or regimes they find objectionable.

They may also be attracted to historical experiences which transport the Ethical Traveller to a time before widespread tourist impact or environmental change made a particular destination inaccessible or inauthentic. The possibilities are numerous.

Proactive transparency. Transparency apps which validate brand claims, and provide tangible proof of the sacrifices and investments consumers make in making eco-concessionary choices. In the future, hotels may be asked to invest in the neighbourhoods they inhabit.

Understanding the impact of different modes of travel. Better understanding of air travel’s carbon footprint will provide a boost to high-speed rail services, and other relatively eco-friendly options.

Offset or upset. Carbon offsetting is an extremely attractive idea to Ethical Travellers, and should be encouraged by the aviation industry as a means of sanctioning users to fly in moderation. This may result in fewer air miles from the Ethical Traveller, but the alternative for some may be wholesale and unconditional rejection of air as a travel option.

Leverages networks to minimise costs and environmental impacts. Some Ethical Travellers will use social networks to organise group travel with the aim of reducing their individual carbon impact.

At the airport

Packing light. Ethical Travellers will pack light, using connected suitcases, packing-management apps and, perhaps, networks of lockers to better ensure that they do not carry extra weight on flights unnecessarily.

Ethical Traveller Service Choice

Launched in early 2014, **WeWatt** is an integrated bicycle and desk unit which allows users to charge smartphones, laptops and tablets through pedal-power.

WeWatt aims to solve the problem of short battery cycles for mobile devices while at the same time addressing health concerns around consumers' increasingly sedentary lifestyles.

The pedal units were installed in a number of places around Europe, including Amsterdam Schipol airport, Brussels airport and various train stations across France.



In flight

Economical compromise. Ethical Travellers may not be willing to pay for extra legroom and other in-flight luxuries for environmental reasons. Economy travel will have an ethical dimension.

On arrival and at destination

Sharing economy. One dimension of 2030's consumer ethics may be anti-corporate, anti-globalisation or anti-urban.

Call of the wild. Ethical Travellers may be drawn towards rural environments clearly "plugged-in" to the natural world. An extreme example is package breaks to eco-resorts.

Micro-voluntourism. A certain group of Ethical Travellers – "Gap Year" students, sabbaticals, those formally or informally-employed by charities – will devote significant portions of their time to causes away from home. Many though, will be looking simply to build some element of "voluntourism" into their break.

“Eco-friendly tours will become more popular. There already are some tours in Russia (e.g. the Baikal Lake) where people collect trash left on the travel route by other tourists and try to minimise their own impact on nature.”

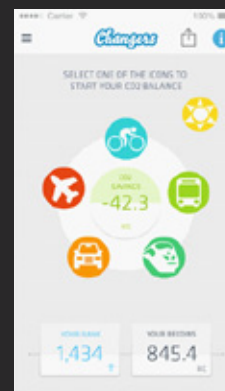
Trendspotter, Russia

Ethical Traveller Tech Choice

CO2 Fit is a tracking app by **Changers** intended to motivate and reward people for making greener travel choices. The app invites users to "become conscious of your daily behavioural impacts and share this increased awareness with your family and friends."

Users activate the app at the start of a trip, and select a transportation type: bike, bus, train, car or plane. and the distance and speed travelled is calculated and used to create a CO2 value for that journey. If the user has used less CO2 than they would have on an average car journey, they are rewarded with Recoins. Recoins are a form of digital currency redeemable against WWF-backed CO2 certificates, each representing a saving of one tonne of CO2. If they take more carbon-costly transport, they create a negative balance in their Recoin account.

This form of carbon accountancy allows users to use more accurately determine how much offsets for other trips that use transport methods with higher CO2 emissions effectively "cost".



In review

Citizen journalism. Many will feel an ethical responsibility to report their experiences back to their networks. The eco-ethical and politico-ethical communities have strong online presences, creating close-knit connected communities around niche forums and social sites.


PREFERRED TECH

Carbon journaling. Technologies enabling the automatic tracking of carbon footprint will provide valuable input to travel decisions.

PEN PORTRAIT

Stan, 35, American

For Stan, holidays are not bought, they are earned. He rigorously monitors his eco-impact using a total life-logging app which plots his lifestyle against an index of eco-ideal behaviours, taking in everything from his transport choices to his electricity consumption to the mileage on the food he eats, and rewards him for his greenness with a payments in a cryptocurrency, KindCoin, an initiative financed by a Corporate Social Responsibility drive at his workplace. He likes this – he gets paid for behaviours which are good for the world, and he finds it satisfying to know that, when he travels, his negative impacts can be offset elsewhere in his life.

To cut down on this negative impact, he creates links with connected communities within the app to arrange group travel, and receives notifications regularly about seats on planes which would otherwise go unfilled. Because he is flexible and impulsive, and his work for a tech start-up allows him a degree of flexibility in his working, he can afford – both financially and ethically – to travel by air more than most, an idea that his non-initiated friends find strange given that he is so eco-aware. He explains that it is about a mixture of app-enhanced awareness, and a willingness to make micro-compromises on his holiday time and on travel luxuries that allows him to travel so regularly and so guilt-free. For example, he charges his devices by cycling or using solar power. He earns KindCoins by microvolunteering his IT skills in local communities when he is away, or by evangelising the eco-cause on his networks. This isn't too time-consuming, and it helps him sleep better at night. 



CONCLUSION

In summary, this research has sought to shine a spotlight on the traveller segments that will grow in prominence by 2030 based on a behavioural, rather than classic demographic understanding. We expect huge change in how travellers select destinations, consume travel services and make purchasing decisions. Macro consumer trends and technological change will drive travellers to adjust spending patterns, with significant knock-on impacts for the travel industry. Those travel brands which are able to appreciate these changing motivations will be best placed to develop new innovative services.

This report is the first of two commissioned by Amadeus this year looking at the traveller of 2030. The six tribes outlined here will be the basis for further analysis taking a closer look at how the travel industry can cater to the needs of the six tribes identified herein.

The second report will describe how brands can reinvigorate each stage of the journey by creating 'purchasing experiences', providing a personalized experience and aiming to surprise and delight the customer. As this report revives conversation around demographics, repositioning their relevance for 2030, the second report will revive conversation around merchandising and how the travel industry can prepare to specifically cater to the needs of the six tribes identified within this report.

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AMADEUS TRAVELLER TREND OBSERVATORY (ATTO)

Amadeus created the Traveller Trend Observatory (ATTO) in 2012 with the goal of deploying a systematic research methodology to better understand the evolution of traveller behaviours and needs. Through the ATTO, Amadeus has engaged with several research firms and have interviewed travellers across the world in focus groups, interviews and quantitative surveys.

As part of ATTO, both a discussion forum (ATTO Steering Committee) and an interactive online platform (ATTO Internal Community) have been established, to consolidate all research conducted on the end consumer and traveller.

ATTO Steering Committee: this monthly committee meeting allows members to exchange information about traveller research studies. The research is then collated in order to support the formation of plans specific to traveller segments.

ATTO Community: an online, interactive platform where all studies, trends and information around travellers is gathered and shared.

Additionally, ATTO focuses on strategic segments each year, referred to as Ad-hoc projects. As part of this, Amadeus has focused on three strategic traveller profiles including *Next Generation*, *Active Seniors* and *Corporate Citizens*. Amadeus' Business Development, Strategy and Product teams have generated new business ideas based on these traveller insights.

By building a deeper understanding of the traveller, Amadeus is in a stronger position to identify and respond to the needs of its customer groups within the travel industry. Amadeus is also empowered to support cutting-edge innovation, in-depth research and development and forward thinking ideas. By investing in traveller focused research, Amadeus aims to support and improve the overall travel eco-system to help shape the future of travel.

For more information on this initiative, please check out the [Amadeus blog](#).

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