Future Traveller Tribes 2030
Building a more rewarding journey

> "The world is a book and those who do not travel read only a page.

Saint Augustine

Foreword

We are pleased to introduce the second phase of our Traveller Tribes 2030 research **'Building a more rewarding journey'**.

In our first study, we commissioned Future Foundation to examine the future traveller tribes set to reshape the travel industry by 2030. The research asked, **'why will we travel in the future?'** and uncovered motivating trends including the rise of social capital seeking, desires to uncover culturally authentic experiences or seek an indulgent 'must have' experience as a reward and escape from busy professional lives, amongst many others.

In this paper **Frost & Sullivan** builds on this important work to answer an equally critical question **'how will purchasing habits evolve?'** and how can the airline industry respond to these emerging traveller behaviours to build a more rewarding and connected traveller journey, from **'inspiring to arriving?'**

By mapping **future traveller behaviours to the traveller journey** this second paper offers practical advice for airlines seeking to better understand, prepare for, and cater to, emerging traveller segments. Of course even though the paper is aimed squarely at the airline traveller journey, the findings will still be useful for players within the broader global travel ecosystem. For example, the research highlights essential areas for greater collaboration with travel management intermediaries and suppliers to deliver a more rewarding journey for both the traveller and the industry. Indeed, whether you are considering questions such as 'what level of personalisation should we offer?' or 'how can we improve the purchasing experience?' we hope this paper provides a comprehensive framework to support your strategic planning.

We at Amadeus look forward to hearing your feedback on this research so that together we can help **shape the future of travel** to 2030 and beyond.

Rob Sinclair-Barnes
Strategic Marketing Director, Airline IT
Amadeus IT Group

**Who lives sees much.
But who travels sees more.**
Arab proverb

FROST & SULLIVAN

Methodology

For this report, Frost & Sullivan built upon a range
of existing reports as well as undertaking new primary and
secondary research. Approaches include:

_ Building on the insights from *Future Traveller Tribes 2030:
Understanding tomorrow's traveller*, a report from Future
Foundation drawing on the firm's proprietary nVision trends
database covering over 60 major consumer trends, research
conducted with travellers in 12 global markets, in-depth
interviews with futurologists and a series of workshops.

_ Drawing on the merchandising strategy framework showcased
in last year's *Thinking like a Retailer* report based on
interviews with leading airlines from around the world,
traveller surveys and expert interviews to better understand the
discreet stages of the traveller journey and airline approaches
to merchandising techniques.

_ Finally, we used a combination of secondary and primary
research including interviews with a range of airline digital and
marketing executives, Frost & Sullivan's internal pool of
syndicated research and the expert analysis of Frost & Sullivan's
Information and Communications Technology and
Aerospace & Defence businesses.

About Frost & Sullivan

Frost & Sullivan, the growth partnership company, works in
collaboration with clients to leverage visionary innovation that
addresses the global challenges and related growth opportunities
that will make or break today's market participants. For more than
50 years, we have been developing growth strategies for the Global
1000, emerging businesses, the public sector and the investment
community. Is your organisation prepared for the next profound
wave of industry convergence, disruptive technologies, increasing
competitive intensity, Mega Trends, breakthrough best practices,
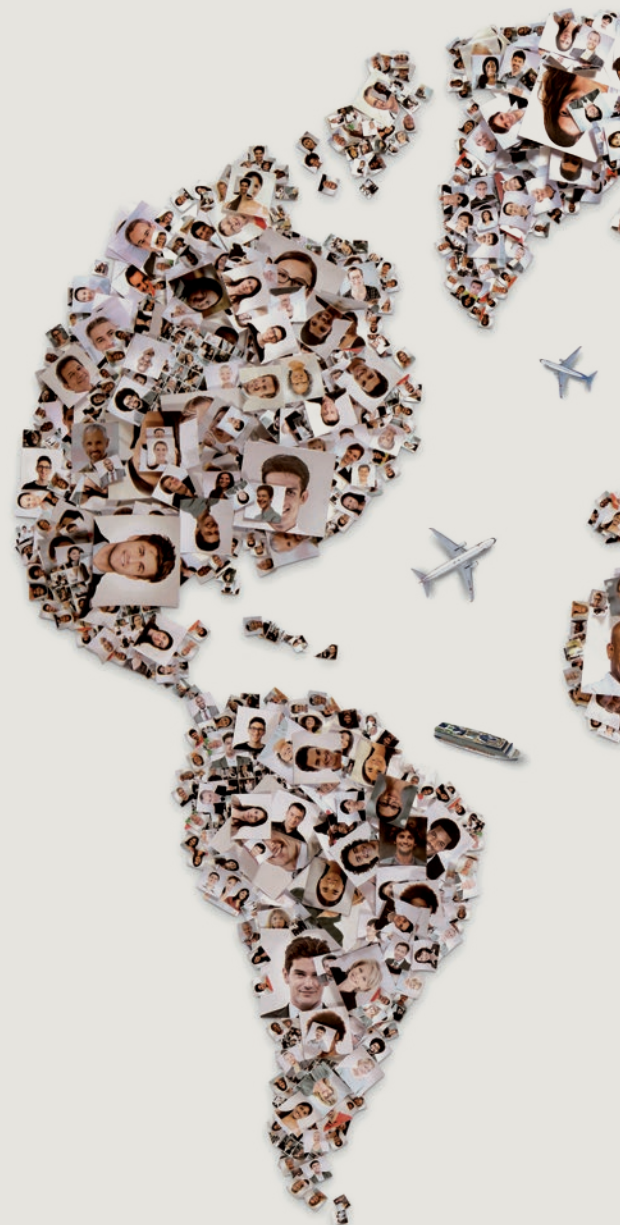changing customer dynamics and emerging economies?

To find out more contact us at www.frost.com

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Lawrence Lundy is an Information and Communications Technology
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"Travelling –
it leaves you
speechless,
then turns you
into a storyteller."

Ibn Battuta

Executive summary

'What, When, Where, Who and How' have been the strategic cornerstones of customer-centric organisations. For companies in the travel industry, answering these questions has never been more important. The traveller landscape has always been complex but as new technologies emerge, travellers are faced with greater choice – and, at the same time, greater complexity. There are now such a variety of solutions and services available that travellers risk information overload. However, if technology is used correctly, it can help travellers navigate the maze of choice and select the right travel experience.

Last year, Amadeus and Frost & Sullivan published *Thinking like a Retailer,* developing a 'merchandising strategy framework' that allowed airlines to build a merchandising strategy based around six critical elements – customer journey, merchandising technique, sales channel, travel services, price, and personalisation; in other words, the **'What'**, **'When'** and **'Where'**.

Earlier this year, Future Foundation authored a report detailing **'Who'** travel providers will need to serve and market to in the next fifteen years: *Future Traveller Tribes 2030: Understanding tomorrow's traveller.* Future Foundation's research identified six Traveller Tribes that will shape global travel in 2030: Simplicity Searchers; Reward Hunters; Social Capital Seekers; Cultural Purists; Ethical Travellers; and Obligation Meeters. Rather than segment customers in a static way by age, gender or cabin class, the Traveller Tribes are identified by their **purchasing behaviours and motivations**. As airlines and other travel providers enter the age of data abundance, this nuanced psychographic approach to segmentation offers new opportunities for brands seeking to understand and remain relevant in today's rapidly changing consumer landscape.

With the 'What', 'When', 'Where' and 'Who' specified, this third report **seeks to address the all important 'How', providing a spotlight on air travel** to propose an evolved framework that can be used to better develop traveller segmentation strategies. Importantly, we seek to **bring the traveller tribes and the travel experience together** to **define how to sell travel services more effectively** and meet the unique needs of the six tribes.

The framework in this paper aims to bring clarity to the complicated traveller experience, giving airlines the foundation upon which to offer products and services to delight customers. This will accelerate airlines' shift from pure flight providers to the more lucrative travel experience provider market. **For airlines, this translates into higher customer satisfaction, revenues, and profits.**

As travellers enjoy ever-increasing access to information, especially via social network sharing, their purchasing behaviours are changing rapidly, arguably faster than ever before. As a result, **established segmentation techniques are no longer enough** to ensure airlines and other travel providers are anticipating, responding to and meeting traveller needs. In fact, travellers' needs – and the options available to them – are becoming ever more polarised. Whilst some travellers want extremely high levels of personalisation, others will consider personalisation a hindrance to their experience. Some travellers may want to be served with a tailored bundle of services at the booking stage of their journey, whereas others might want to take a 'do-it-yourself' approach, booking services à la carte as and when they are inspired to throughout their journey. Some travellers will want constant contact and luxury services, while others will want to be left alone with services allowing them to be closer to nature.

In a world where information is available at everyone's fingertips, new advice and guidance through both online and offline personalisation techniques can finally enable airlines to understand and better serve traveller needs. **Ultimately, this will deliver a more rewarding global travel ecosystem for both travellers and suppliers.**

Section 1 · **Traveller Tribes 2030**

In an update to *Future Traveller Tribes 2020*, Future Foundation identified the emerging trends; habits and purchasing behaviour that will reshape the global travel industry by 2030. As the speed of technological change continues to accelerate, it is important to remember that **technology is a tool for addressing human needs**. The six traveller tribes are defined by the fundamental motivation for their travel. Some people travel because they have to be somewhere; others travel for personal growth; others for the social capital they gain.

Many travellers are a mixture of these tribes. It is critical that airlines understand the individual traveller's behaviour in order to personalise services and delight each traveller.

It is also true that the tribes approach is dynamic: individuals will fall into different tribes depending upon their trip, why they are travelling, who they are travelling with and other factors. The challenge for airlines is to understand which tribe the individual falls into and when, so that they can cater to their needs with the appropriate products or services.

For more detail on Traveller Tribes 2030, download full report amadeus.com/tribes2030

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

MATERIAL
EXPERIENTIAL

Source: Oxford Economics/nVision, January 2015

Future Traveller Tribes 2030
The six Traveller Tribes

Obligation Meeters

have their travel choices restricted by the need to meet some bounded objective. In addition to business travel commitments, these obligations can include personal obligations such as religious festivals, weddings, and family gatherings. Business travellers are the most significant micro-group of many falling within this camp. Although they will arrange or improvise other activity around their primary purpose, their core needs and behaviours mainly are shaped by their need to be in a certain place, at a certain time, without fail.

Simplicity Searchers

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

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.

Reward Hunters

focus on self-indulgent travel that will often mix a focus on luxury with self-improvement and personal health. The seeking of 'reward' for hard work in other areas of their life is what motivates them. They are looking for luxury experiences that are several notches above the everyday.

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 with the fact of their being watched by online audiences ever in mind.

Pen portraits of the six Traveller Tribes

Obligation Meeters ·······································

Seonyeon, 26, South Korean
PR Manager

Seonyeon decides to meet her new client in person, wanting to create a strong relationship from the start. She logs onto her mobile workplace app and communicates her plans with her colleagues – who are all currently scattered around Asia on business. She chooses to extend her trip to work in some leisure time, automatically updating her vacation allowance. When delays occur due to bad weather, she receives automatic contingency plans and an upgraded seat.

Ethical Travellers ·································

Stan, 35, American
Technical Assistant for start-up

Stan rigorously monitors his eco-impact through a total life-logging app, which plots his lifestyle against eco-ideal behaviours. In his day-to-day life, he gets paid for his 'greenness' with crypocurrency KindCoin, financed by a Corporate Social Responsibility drive at his workplace. Through this, he can monitor his positive behaviours very easily, meaning he feels better about using air travel, as he knows the negative ecological impact is offset elsewhere in his life. He strives to give back to the areas he visits, microvolunteering his IT skills to local communities.

Cultural Purists ····························

Kwame, 28, South African
Freelance author

Kwame won't travel to Mexico before completing an immersive Spanish course and reading as many books and articles as possible. He books his trip with no planned accommodation, so logs into a sofa-hopping network on arrival. He wears connected eyewear around Mexico City, giving him non-obtrusive flashes of information on his surroundings. Finding the city too filled with tourists, he heads north to a quiet village at the last minute, seeking the "true Mexico".

Simplicity Searchers

Arjun, 40, Indian
Marketing Manager

With a stressful and exhausting job and little holiday time, Arjun likes to splurge on two week holidays that don't involve lengthy planning on his part. Bespoke holiday packages, which are exactly matched by his algorithm-informed travel agent, appeal most to Arjun, as he can relax safe in the knowledge everything down to dinner reservations will be made for him. He keeps track of his itinerary through an intelligent mobile application.

Reward Hunters

Celine, 60, French
Business executive

Celine escapes her busy work week through trips booked by her luxury travel club, to retreats only open to a select few. She makes time for exotic mini-breaks by sharing real-time heartbeat data as a password, which allows her to breeze through airport security, with her preferences for the flight already noted. She undergoes a full medical diagnostic exam with the onsite doctor, then decides to take a helicopter trip to a nearby mountain with her personal drone, which snaps pictures of her sightseeing and relays them back to her personal cloud.

Social Capital Seekers

Fionnula, 20, Irish
On her second gap year

Fionnula receives heavily discounted, personalised trip offers based on the data from her Instagram feed. Whilst away, she sets her wearable lifelogging device to 24/7 record and gains followers of her Italian trip by the minute. She takes care to fill her days with beautiful sights and quirky attractions that will appeal to her social network. She meets a popular vlogger in the area and snaps some selfies, before producing a daily vlog herself.

Section 2 · **Evolution of the traveller experience**

Using the merchandising framework defined in *Thinking like a Retailer*, this section explores how the components of the merchandising framework will evolve. Firstly, it will show how the traveller journey will extend and integrate. Secondly, it will outline how merchandising techniques will evolve into a more customer-centric purchasing experience, which, if managed effectively, will drive revenues and customer satisfaction. Thirdly, it will examine how sales channels will increase in variety to become digital and mobile. Fourth, it will explain that data will become the most important resource available to an airline, and how customers will come to expect this data to be used to personalise their travel. Finally, it will demonstrate how new types of travel purchasing experiences will be possible through the development of new technologies and more effective use of traveller data. **Only when we understand how the travel experience will change, can we begin to understand how the needs of the different tribes can be met.**

The traveller journey

Until recently, the traveller journey was disconnected and, in essence, ended for airlines as soon as the traveller stepped off the plane at their destination. For airlines, the shopping and booking phases were the most important, as this was where flights and other big-ticket items such as car rental were booked. Aside from a follow-up email before the flight and at check-in, airlines had limited touchpoints with their customers. This has changed with the rise of the smartphone, which has huge implications for both customer service and revenue generation. At the airport, customers can share disappointments and complaints immediately, causing huge damage to an airline's reputation if not adequately managed. Airlines are quickly adapting their businesses to use social data to proactively manage complaints, but they are yet to utilise the airport as an effective sales channel.

Thinking like a Retailer reinforced the idea that the traveller journey does not end. The moment a traveller returns from a trip is the perfect moment to reinforce the customer relationship with 'post-trip' services such as spa days or other tailored offers. Airlines now have the capabilities to integrate the whole journey, including both direct and indirect channels. The customer expects a seamless experience regardless of the device, channel or service provider they are using.

The traveller journey will not change fundamentally because of technology. Technology can be a stimulus of change on consumer behaviour, as will be the case with virtual reality. But it is also a way for airlines to respond to changing travel expectations, as with a smartwatch boarding pass. In the future, the traveller will be accessible at all times throughout their journey across a range of different devices. The smartphone has extended mobile accessibility: with new faster mobile network standards being developed around 5G, and a focus from Google and Facebook on 'connecting the unconnected', by 2030 there will be very few places without connectivity. Today, the traveller is arguably lost to the airline once they leave the plane. Global standardised mobile connectivity will add a new phase, 'on-trip', to the journey.

By 2030, the traveller journey will not end in the arrivals lounge. Successful airlines and complementary intermediaries such as agents, travel managers and concierge services will leverage each stage of the journey to provide a personalised experience, to delight the customer and to reinforce their brand.

> "We absolutely think in terms of the whole customer journey. We have the small travel concept which is our vision to help customers get through the airport as efficiently as possible and to remove all bottlenecks. We are working with security and border control to help improve the whole customer experience."
>
> Petteri Skaffari, *Head of Customer Experience and Sales Applications, Finnair*

The trip cycle

Post-trip:
A currently under-utilised stage. Airlines should engage with travellers on their return home to better understand their needs and desires for future travel, and to build a stronger relationship with customers.

On-trip:
This will be a completely new phase facilitated by global roaming SIMs and widespread connectivity. Personalised offers will be delivered at extremely relevant times based on context.

At airport:
More efficient airport processes especially around security and check-in, means less time needed at the airport.

On way to airport/check-in:
As location-based technologies improve and smartphone and smartwatch apps become more sophisticated, customers will be more comfortable making purchases on the way to the airport. For many travellers, especially business travellers, this phase may be the first time they have thought about their trip. We will see a decreasing importance of check-in as mobile comes to dominate: check-in will become a process, not a destination.

Inspire:
A key opportunity to position an airline's flight options and services, and better influence customer selection at the start of the traveller's experience decision-making process.
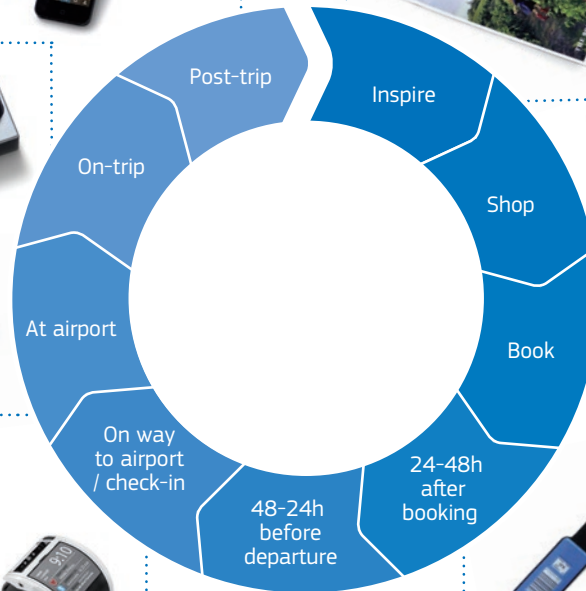
Shop:
An important personalisation and discovery stage; we will see holography, augmented and virtual reality offer more immersive shopping experiences, with tailored choices for both bundled and unbundled selection.

Book:
This stage will utilise mobile channels as the use of PCs declines; the target will be "frictionless" booking using stored preferences, biometrics, and natural user interfaces.

24–48 hours after booking:
This will become less of a distinct phase, as increased customer data means customers can be contacted at varying times based on what is most effective for that individual.

48–24 hours before departure:
This will be a critical stage for last minute 'door-to-door' planning and an opportunity to enhance the traveller journey, by aligning availability of upgrades and offers with customer preferences – all informed by sophisticated revenue management.

Post-trip

On-trip

At airport

On way to airport / check-in

48-24h before departure

24-48h after booking

Book

Shop

Inspire

Purchasing experiences

The discussion around 'merchandising' is evolving. The traditional view of full service carriers bundling and low-cost carriers unbundling has evolved into hybrid models, which use a better understanding of customer preferences and what they value to shape how components are combined. These hybrid models are providing the most effective and efficient merchandising offer, rewarding to both traveller and airline, as a return on investment. A widespread current approach to merchandising is: **how can we sell more to customers?** This will need to be more nuanced in order to be successful in selling to future travellers. Traditional techniques for differentiating services have involved bundling products, customer contact techniques and focusing on user experience on a website. All of these techniques will become more sophisticated, but also far more widespread in the industry, and so competitive differentiation will get even more difficult.

A more effective approach will be creating 'purchasing experiences'. This is a customer-centric approach that ensures incentives are focused on creating positive purchasing experiences before revenue maximisation. The best example of this is Apple and their approach to customer service and revenue generation. Purchasing a product from Apple is a delight: everything from the booking flow, to the unboxing in store, to the customer service if a product is faulty. Customer service is first and foremost a tool to build loyalty, and revenue will flow naturally from happy customers. **A focus on merchandising and revenue maximisation has in many cases frustrated customers and squandered loyalty.**

To appeal to future traveller tribes, airlines have to create 'purchasing experiences' and move away from focusing on merchandising solely as revenue maximisation. Building 'purchasing experiences' will be a core component of brand building, allowing successful airlines to avoid commoditisation.

Future of personal bundles

Bundling has already become more sophisticated with the use of 'fare families' and 'branded fares', both of which offer value to customers and airlines. Progress in **big data analytics will allow airlines to personalise bundles in real-time** to the individual. Personalisation tools are already becoming more attainable and more advanced as companies begin to move data from business silos into company-wide cloud-based databases. As more data is captured from social media channels, location-based mobile services, and health data from wearables, bundling will become increasingly granular. This granularity means higher conversion.

For example, in the weeks before visiting the airline tablet application, a customer has tweeted that they are looking forward to a break from work. This information is combined with historical trip data showing that this individual has previously booked a spa day with a third-party. When this customer visits the tablet application, a 'relaxing bundle' is surfaced. Such a bundle would be perfect for the Simplicity Searcher tribe.

Perpetual touchpoints

As the traveller journey extends with mobile devices and global wireless connectivity, **the number of potential touchpoints becomes virtually unlimited**. Previously, the customer contact environment included the airline website, email, check-in and the in-flight cabin crew. The environment is already becoming more complex, with push notifications, context-aware emails, and social media channels. Airlines are beginning to integrate these touchpoints in the event of a crisis or delay. However, in the future, the quality of information is key and perception of the airline as a trusted source will be essential to avoid confusion and frustration during the journey.

The adoption of wearable devices and smart clothing on travellers, as well as service robots with the ability to converse in natural language, opens up completely new ways to engage with customers. While customers are available 24/7, airlines must use the right contact technique at the right time to avoid irritation. **This is where understanding the traveller tribes will provide airlines with a valuable framework to work with.**

For example, smartwatch alerts will only be for extremely time-sensitive information and will use light rather than more intrusive vibration. Service robots will offer reactive advice to customers and only offer services that the customer has explicitly stated a need for.

Frictionless purchasing

Making purchases will continue to become easier. User experience design is key to this. Today, these techniques include: user interface optimisation; promotions and third-party deals photo/video integration in the booking flow; paying with miles; and peer recommendations. Essentially, all of these techniques make it easier for customers to discover and purchase offers. The discovery side of the equation will come to be dominated by video in the short-term, and in the longer term we will see more immersive experiences in augmented reality, holographic environments and, ultimately, virtual reality. **The purchasing element will gradually become frictionless and ultimately automated.** Smartphone and wearable biometrics and digital wallets will make the action of payment quicker and easier.

For the travel industry, payment transparency and seamless revenue management processing between all providers and intermediaries will become ever more important. Options will need to be clarified in the event of change, refunds or cancellations.

For example, in a virtual reality experience, the voice command 'I agree to purchase' is all that is needed to complete a transaction. In the real world, a seat upgrade is purchased with a single tap of the smartwatch. As friction is reduced, conversions will increase – but only if extremely personalised.

"Mobile is, and continues to be, an important channel for Southwest to engage with our customers. Southwest strives to provide dynamic, personalised, and contextual information throughout the travel journey to ensure a Southwest experience anytime, anywhere, on any device. We are excited to see our mobile channel continue to grow and evolve as an avenue to surprise and delight our customers before, during, and after their travel experience."

Randy Sloan, *Senior VP and Chief Technology Officer, Southwest*

New sales channels

Just like the traveller journey and the purchasing experience, the sales channel landscape will increase in complexity. The best way to reduce the complexity is to think of sales channels as **'inspiration' versus 'information'**. Information sales channels will need to be completely personalised, with short-form content, and focused on purchasing rather than discovery. Inspiration channels on the other hand, have larger screens, are more immersive and used as a discovery tool. The customer is generally not moving, therefore more complex service offerings can be presented.

Inspiration channels

Smartphone

The smartphone will be the single most important digital display for the next 10 years. Usage is moving fast from the PC to the smartphone, and from the web to the app. The industry is still in the midst of this shift, but Internet companies that are moving fast, such as Facebook or Airbnb, are already seeing usage and engagement dominated by mobile. Mobile applications with the ability to access location and store data offline, such as payment details and travel information, will come to completely dominate airline purchases by 2030.

PC/Tablet

Tablet usage will slowly overtake PC usage, and the PC will slowly go the way of the fax machine. In emerging markets such as Brazil, China and Indonesia, the PC broadly has been skipped. New Internet users will never use a PC. All tablets will have fingerprint sensors allowing one-touch transactions, which accelerates the shift of usage and purchasing from PC to tablets. Tablet experiences will be video-orientated, providing holographic experiences to help inspire customers.

Virtual Reality headset (VR)

The level of immersion achieved by virtual reality means customers will choose to visit VR spaces in comfortable and static surroundings. VR storefronts or spaces will be as important as a website is today for airlines, giving potential customers a chance to experience trips before they buy. This 'try-before-you-buy' business model will be standard in the travel industry, and VR is going to be a standard feature of the in-flight entertainment system in 2030. One of the most valuable services in VR will be for travellers to recreate their trips when they return: the 're-experience' market will be one of the largest new travel markets.

Information channels

Smartwatch

A smartwatch, such as the Apple Watch or Samsung Gear, will become the remote control for the physical world. They will not replace smartphones, but will be used to complete quick, short tasks such as hailing a taxi, or scanning a boarding pass. Airlines are already exploring smartwatch-based boarding passes. The display is too small to offer complex services, and very distracting to push too many offers. This channel must be used sparingly and only at extremely relevant times, based on location and need.

Augmented Reality (AR) Glasses

Despite the underwhelming sales of Google Glass, augmented reality glasses will be an important sales channel by 2030. Further miniaturisation is required and issues of privacy resolved before AR glasses become commonplace. Augmented reality offers the ability to layer digital information onto the physical world, providing information and valuable experiences. Offers and services will be overlaid onto real locations offering natural language purchasing.

Advanced robots

Advanced robots, also called service robots, will probably replace some existing check-in processes and kiosks. Edmonton International Airport in Canada is already testing these service robots. Expect to see more service robots in airports by 2030, as their abilities in vision and language improve. The Henn-na Hotel in Nagasaki, which opens later in 2015 will be the first hotel completely staffed by robots, and hints at a robotic future in the travel and hospitality industry. We will see robots staffing and navigating airports as well as recognising and interacting with customers. These robots will have access to real-time airline customer data, so they can provide a personalised service. By 2030, these robots will have exceeded human-like vision, to the point that they can understand a customer's health and emotional state to better serve their needs.

Data and personalisation

Big Data is a buzzword that has been around for a long time and is already well understood. With so much data being created, airlines and their complementary service providers must collect and use this data to offer a better service. In theory it sounds simple, and many airlines are already launching programmes to address their data needs. As the traveller journey, purchasing experiences and sales channels become ever more complex, **data will be far and away the most important resource available to an airline: giving the competitive advantage.** Those that can effectively collect and use data will win, and those that are unable to adapt their businesses to do so will fail.

*In the next few years, the technolo*gy industry will move beyond collecting data to actually creating real value from the data. A technique called **'machine learning' will allow airlines to have a deeper understanding of their customers** and automate many manual-processes. Netflix already uses these techniques to recommend new movies to watch, and Amazon offers other products you might like. These systems will become more personalised as machine learning techniques such as deep learning and reinforcement learning become ever more accurate.

We are on an exponential growth curve with the advancement of personalisation and machine learning. Greater, affordable computing power and data storage combined with the volume of user-generated data will allow airlines to start truly personalising their products. Simply put, the more data that can be captured, the most personalised products can be. This means, as long as airlines are clear on what data they are collecting and offer value for that data, they should be looking to collect as much as possible.

By 2030, expect to see artificial intelligence (AI) integrated into the travel agency channel, who would have been authorised to collect data by the traveller from a variety of sources including real-time location, emotional state, health status, live video-feed, social updates, and conversations. The AI will understand the traveller's needs and desires, and provide solutions at exactly the right time. 100% conversion rates will not be uncommon. This is not a fantasy world: the technological underpinnings of this AI, such as machine vision and natural language processing, are seeing improvements on a weekly basis. This AI could be the traveller's favourite airline, but it could also be Airbnb, Google, or HipMunk. Competition in 2030 is not limited to other airlines or even travel providers; it extends to include all 'experience providers'.

New types of travel experiences

Airlines are slowly evolving their thinking and moving deeper into the travel experience space with new travel services. Last year *Thinking like a Retailer* showed 79% of travellers prefer to buy travel services directly from recognised brands. If an airline can leverage the trust that is associated with their brand, they will be able to meet the needs of future travellers. It is critical that airlines move away from an 'ancillary services' mindset, which suggests these services are a bolt-on to the core flight product. That is true today, but to succeed in the future, airlines must see the flight as just one travel experience that they offer. Not only will this approach deliver a more rewarding journey for customers, it will result in stronger brand loyalty, diversification of revenues, and higher profit margins.

The types of services that can be offered to travellers will be impacted by technological advancements in artificial intelligence, robotics, 3D printing and virtual reality. **But ultimately, travellers will still have the same human needs as they have always had – it is their purchasing behaviour that will vary**. The best way to approach new travel experiences is to understand customer needs and see how technological developments can address those needs, rather than how a technology can be used to fit existing products and business processes. Each future tribe will have different needs that can be met with different services. Each tribe will have preferences for different experiences. Some travellers will demand luxury services, whilst others will demand services that allow them to be productive.

New types of travel experiences may not be products or experiences at all: there will be huge demand for a trusted travel advisory service. As the amount of information available on every hotel, destination and service grows, and as more travellers choose to build their own holidays, travellers will seek reliable advice. These advisors could be travel agents that have adapted to the digital world; an extension of airlines' concierge services in their frequent flyer programmes; or a trusted brand from another industry. Each tribe's preferences will be explored further in Section 3.

"Singapore Airlines is committed to transparency and trust in the collection and use of customer data. The customer is always at the forefront of our minds. We believe that there will be tremendous value in using Big Data to personalise products. We want our customers to be partners in the personalisation journey, and in doing so, have a richer and more rewarding travel experience."

Gerald Tan, *Manager Customer Research, Singapore Airlines Limited*

Mapping Future Traveller Tribes to their purchasing behaviour

If you apply the components of the evolving traveller experience and touch points (the traveller journey, purchasing experiences, new sales channels, data and personalisation and new types of traveller experiences) to the six traveller tribes, it then highlights which components are the most relevant to each of the tribes. The table below provides an 'at a glance' overview of this mapping, which will be detailed per tribe in Section 3.

	Simplicity Searchers	Reward Hunters	Social Capital Seekers	Cultural Purists	Ethical Travellers	Obligation Meeters
Opportunity to influence	Inspire Shopping Booking	Inspire Shopping Booking	Any time	Close to time of use	Inspire Shopping Booking	Shopping Booking
Degree of personalisation	Very high	High	Very high	Very low	High	Very high
Purchasing experience	Bundle	Bundle	Both	À la carte	Bundle	Bundle
Level of contact	Very low	Low	Very High	Low	Medium	Medium
Touchpoint devices	Inspiration-centric	Any	Any	Inspiration-centric	Information-centric	Information-centric
Types of experience	Convenience	Luxury & wellness	Luxury & productivity	Local	Ecological	Productivity

Section 3 · **Purchasing behaviour is a key differentiator**

Understanding the different purchasing behaviours of each tribe will allow airlines and complementary travel providers to more effectively meet their needs.

Purchasing behaviour: **Simplicity Searchers**

Inspiration sources

This tribe will be most open to personalised offers aligned to their requirements, especially from a trusted brand or supplier who can provide the perfect package to suit their needs. Providers must be simple, transparent, non-intrusive and understand the travel requirements of, for example, a family of five wanting interconnecting rooms.

Degree of personalisation

Simplicity Searchers will expect extremely high levels of personalisation; they consider simplicity to be a reward worth giving up data for. Airlines and travel providers should build strong relationships with Simplicity Searchers, especially during post-trip periods in order to build up data on the individual. This will allow personalised bundles to be ready during the inspiration stage without increasing the purchasing friction for the traveller by having to give more preferences at the time of booking.

Opportunity to influence

The best time to reach this tribe is during the inspiration and shopping stages of the journey, as the interest in additional services will decrease after Simplicity Searchers have booked their trip. In fact, individuals belonging to this tribe could be irritated by intrusive offerings after the booking stage. They want everything to be planned and simple, additional offers will be seen as annoying and are likely to damage the brand perception. They will expect their needs, e.g. that they are travelling as a family group, to be understood without having to explain.

Purchasing experiences

This tribe is the most open to truly personalised bundles. 'Frictionless' purchasing is critical, whilst 24/7 customer interaction should be severely limited. Airlines and their complementary service providers should focus on full end-to-end travel packages, as Simplicity Searchers are more prepared to pay extra to remove the hassle from their trip than others. It is with this tribe that airlines can become a true 'travel experience provider' instead of just another airline. Purchasing the bundle needs to be simple, as this tribe wants fewer choices and wants to make decisions quickly and easily using voice or gesture interfaces. Customer interaction must be limited after the customer has purchased the bundle: the only customer interaction should be for helpful information using non-intrusive notifications such as a light on a wearable device.

Touchpoint devices

Travel providers will reach customers by offering immersive purchasing experiences. This tribe wants to be shown a video or virtual reality experience that aggregates and simplifies the entire trip. Simplicity Searchers will not buy a service on a tablet, and then another service using the service robots at check-in, and then another service using their AR glasses. That is too complicated for them. Rather, they will want a single channel to buy everything, a 'one-stop-shop'. The amount of money being spent in one transaction will mean this tribe will want the large display of a tablet, television or virtual reality headset.

Simplicity Searchers – Purchasing behaviour at a glance

Opportunity to influence	Inspire	Shopping	Booking	Close to time of use	Any time
Degree of personalisation	Very low	Low	Medium	High	Very high
Purchasing experience	Bundle		À la carte		Both
Level of contact	Very low	Low	Medium	High	Very high
Touchpoint devices	Inspiration-centric		Information-centric		Any
Types of experience	Convenience	Local	Luxury & productivity	Luxury & wellness	Productivity	Ecological

Types of travel experience

Convenience is the key word for this tribe. After 2020, autonomous vehicle pick-up and drop-off at both home and destination will remove the hassle of public transport, parking and timing anxiety. Even today, airlines could offer a service that includes a taxi service such as Uber, GrabTaxi or Kuaidi Dache in China, to pick the traveller up at their home and take them to the airport. Check-in can be completed using geo-fencing technologies, so travellers can go straight from the taxi to security. There is no need to even open a mobile app; this is truly frictionless travelling. Augmented reality applications to help this tribe will include real-time translation, navigation, and discovery help.

Luggage is another pain-point for this tribe. From 2020 onwards, a valuable proposition will be the pick-up of baggage from the taxi by a service robot and placement into a taxi at the destination airport. The size and shape of suitcases is likely to standardise to make the robotic pick-up more efficient, much in the same way that the shipping container standardised to increase efficiencies. The pain-points of carrying luggage will gradually be eliminated. For frequent flyers, airlines could provide a suitcase of clothing and toiletries at the traveller's destination hotel, which could be used for the duration of the stay and left behind. By 2030, 3D-printers in the hotel room will mean travellers will print their new clothes from virtual design stores and even scan their own clothing at home to be 3D printed on arrival.

> "No one realises how beautiful it is to travel until he comes home and rests his head on his old, familiar pillow."

Lin Yutang

Purchasing behaviour: **Reward Hunters**

Inspiration sources

This tribe wants to know about special experiences, locations and places to stay that are a notch above the rest. Styles of travel can vary significantly, from a relaxation retreat to an exhilarating experience or event. They are turned off by mass-market offers, preferring to avoid the crowds and turn to or pay for expert advice and concierge services to select the right choice.

Degree of personalisation

Reward Hunters are more than willing to provide data that can be used to personalise service offerings. However, they are very discerning and will only provide data to trusted sources. They will allow a trusted concierge service or digital personal assistant to use as much personal data as they can capture. This will be from their connected home devices such as a Nest thermostat or connected fridge, smartphone and wearable data to be collected to better understand their own nutrition, fitness and overall wellbeing. As long as there is a clear benefit to providing the data, this tribe will download an app and give permissions.

Opportunity to influence

This tribe will understand better than most the value of switching off from intrusive technology and being at one with the environment and nature. Reward Hunters will value 'being in the moment', and will not want to be slaves to technology. This means they will be most open to service offerings and targeted advertisements during the inspiration, shopping and booking stages of the journey. They will be open to notifications in the run-up to the trip, but once they are on the plane, members of this tribe will not want to be bothered.

Purchasing experiences

Personalised bundling will be extremely effective with this tribe. Reward Hunters are happy to provide data if the airline is able to respond by creating extremely tailored bundles. Travel providers need to be very careful when contacting members of this tribe and use methods that are as non-intrusive as possible, which must be very personalised. Wearable vibration and notification lights will be effective. 'Frictionless' purchasing will be adopted extremely quickly as this tribe just wants technology to work and get out of the way; voice purchases will be especially prevalent.

Touchpoint devices

Smartphones will be the most important sales channel for this tribe. Reward Hunters will be big users of discreet wearables and smart fabrics, and want technology to provide relevant information but not get in the way. As travel search and discovery become even more digital, service robots and artificially intelligent agents will be considered 'mass market'. There will be a role for a human concierge providing a human-touch to the travel experience.

Types of travel experience

Travel providers should be looking to meet this tribe's needs with luxury and wellness products as well as memorable experiences. At the inspiration and post-trip stage, destination spa days, yoga classes and in-demand restaurant seats would be good services to push. Reward Hunters would be interested in a spiritual journey and/or location. This could include an adventure such as climbing Mount Kilimanjaro in Tanzania or a spiritual journey such as visiting Varanasi in India. Members of this tribe want more than reward in the narrow sense, they are looking for more than just pampering, and they want to be taken care of spiritually and physically.

Reward Hunters - Purchasing behaviour at a glance

Opportunity to influence	Inspire	Shopping	Booking	Close to time of use	Any time
Degree of personalisation	Very low	Low	Medium	High	Very high
Purchasing experience	Bundle		À la carte		Both
Level of contact	Very low	Low	Medium	High	Very high
Touchpoint devices	Inspiration-centric		Information-centric		Any
Types of experience	Convenience	Local	Luxury & productivity	Luxury & wellness	Productivity	Ecological

VIP services should be pushed to this tribe. Improved VIP fast track access, lounge and 'straight to plane' services will sell well with this tribe. Over the next few years, driven by the Apple Watch and new types of wearable devices such as smartwatches, Reward Hunters will become used to measuring their physiological signs. From 2020 onwards, on-board healthy food and drinks based on preferences and real-time nutritional data would be a compelling proposition for airlines. They should collect historical and real-time physiological signals such as blood pressure, heart rate, temperature, hydration and anti-oxidant status to provide personalised and timely on board food and drink. Members of this tribe will consider quality sleep to be a core part of their routines; smart blankets that use physiological signals to wake up the individual at the optimal point, and 3D-printed earplugs with noise-cancelling capabilities, moulded to the traveller's ears, would be strong service offerings.

"Travel is the only thing you buy that makes you richer."

Unknown

Purchasing behaviour: **Social Capital Seekers**

Inspiration sources

This tribe wants to be seen as having the kinds of travel experiences their peers and network groups are trending and tweeting about. Social Capital Seekers will be heavily influenced by their social media connections, and will gain insight and inspiration from friends or 'celebrity' recommendations on Instagram, Pinterest and Facebook. They will potentially list and share their top next destinations in preparation for finding the right offer.

Degree of personalisation

Personalisation is core to this tribe's existence. Social Capital Seekers will want every single service they use to be personalised as much as possible. Members of this tribe will invest in tools that enable more of their lives to be captured and quantified for their own benefit. They will think nothing of installing connected home devices to better understand their energy usage or when they need to order more food. They will be the first to invest in smart clothing that measures physiological signals so that healthcare providers can offer personalised healthcare. Privacy will be seen as an asset they trade to receive better services.

Opportunity to influence

They will be open to new services at any time during their journey, as long as the service increases their social capital. Contextual relevant services pushed based on location, time and preferences will be especially valuable. The inspiration and booking stages will be very important to offer a personalised bundle, but also the airport and on-board stages will be important. The Social Capital Seeker will certainly be interested in priority treatment that can be captured and shared; cabin upgrades are very much the Holy Grail for this tribe.

Airlines will have a tremendous amount of data about these travellers and so they will be able to create a truly personal bundle of services for the Social Capital Seeker. Unlike the Simplicity Searchers though, this tribe is extremely open to continued contact. As long as offers are not completely irrelevant – and they should never be – this tribe is less likely than others to be irritated by airline contact. They live their lives in the digital and virtual worlds and notifications are deeply entrenched in their lives. 'Frictionless' purchasing is as important to this tribe as any other; they will be comfortable across all new techniques including voice, gesture, touch, and by 2030 some will have tried brain-computing interfaces, devices that enable actions through the power of thought.

Touchpoint devices

Social Capital Seekers are extremely comfortable using any fixed or mobile digital channel. They will be happy interacting with service robots as much as service avatars in virtual spaces. Augmented reality (AR) applications will be adopted rapidly by this group. The ability to layer social data and take photos instantly using a heads-up display provides an even easier and quicker way to share than a smartphone. AR-based service offerings will work particularly well with this tribe. Virtual reality stores will be used extensively to virtually experience a travel destination and offer before purchasing, this will become as much a part of the purchasing behaviour as using review sites are for today's travellers.

Social Capital Seekers – Purchasing behaviour at a glance

Opportunity to influence	Inspire	Shopping	Booking	Close to time of use	**Any time**
Degree of personalisation	Very low	Low	Medium	High	**Very high**
Purchasing experience	Bundle		À la carte		**Both**
Level of contact	Very low	Low	Medium	High	**Very high**
Touchpoint devices	Inspiration-centric		Information-centric		**Any**
Types of experience	Convenience	Local	**Luxury & productivity**	Luxury & wellness	Productivity	Ecological

Types of travel experience

The key to targeting this tribe is to offer services that will enhance social capital. Creating a sense of scarcity works today and it will continue to work in the future. Any product that is limited, rare or expensive will be in demand by this tribe. Cabin updates, champagne, and helicopter rides will all be valuable. We can already see Social Capital Seekers documenting their travel experiences today: for example, FunForLouis is a Youtube channel featuring Louis Cole, a vlogger travelling the world and broadcasting his experiences via social media to a huge online following.

Airlines should utilise this desire to gain social capital by advocating 'sharable moments' prior to take-off or on the runway when the plane has landed.

Beyond the experience itself, airlines also need to make it easy for Social Capital Seekers to share and network. Always-on connectivity will always be extremely important, and this tribe will likely pay for super fast international network access allowing them to live stream and record every second of their trip. Today Facebook 'likes' generate social capital; tomorrow every move will be 'liked' and commented on in real-time. Social Capital Seekers will ask: 'do you want to visit the museum or go to watch a football match?' The traveller's followers will vote and watch what happens next. This interactive video broadcasting will be one of the most important activities for this tribe on their trips. This service is in a nascent stage with companies such as Periscope and MeerKat already enabling people to livestream their lives.

"By giving people the power to share, we're making the world more transparent."

Mark Zuckerberg

Purchasing behaviour: **Cultural Purists**

Inspiration sources

The Cultural Purist gathers stimulus from lifestyle communication media such as TV documentaries; YouTube and Vimeo user-generated travel videos; food and nature programmes and blogs; and books and films that share an insight into a diverse and authentic travel destination. They seek to be inspired by travel experiences that will allow them to immerse themselves into another way of life for the period of travel, whether this is a few days or a sabbatical.

Degree of personalisation

Cultural Purists do not want vast amounts of data used to personalise services. In fact, as a tribe concerned about the increasing personalisation of services and advertisements preventing true discovery, members of this tribe do not want their past experiences or preferences to guide their future plans. From an airline perspective, it will be difficult to gather and use data for this tribe. Services will have to be varied and flexible rather than truly personal.

Opportunity to influence

At the opposite end of the spectrum to the Simplicity Searchers, members of this tribe will be open to new services at every moment of their journey. They will not book all of their travel at the booking stage, instead they will book the minimal amount possible, building into their trip as much freedom as they can and making plans as close to the event as possible. The airport presents opportunities to offer services that can be redeemed immediately such as restaurants, but the cultural purist doesn't like to spend much time in the airport. The on-trip phase is the most important stage for this tribe. However, ensuring relevance will be difficult for the airline without vast amounts of data.

Purchasing experiences

Product bundling will not work with this tribe. Cultural Purists will avoid bundles in favour of à la carte services offered at the point of use. 24/7 customer contact is possible with this tribe, but a risky strategy with limited data. They want authentic experiences and don't want technology to get in the way. Airlines should reach out cautiously but only through non-attention capturing channels such as wearable lights or in-stream Facebook or Twitter updates. 'Frictionless' purchasing is as important to this tribe as any other. Technology should be invisible and not interfere with experiences. Voice purchasing and biometric authorisation will be valuable, reducing the time and attention needed to make purchases.

Touchpoint devices

Sales channels are likely to remain similar to today. This tribe will, as much as possible, avoid robotic channels and prefer the human touch. This may extend to the 'old school' approach of picking up the phone and calling hotels or service providers directly. Indirect channels will be used extensively, human travel agents that can provide local knowledge and off the beaten track experiences are going to be in high-demand for this tribe. Virtual reality experiences and augmented reality applications will be avoided. The smartphone will, of course, be widely used, but these travellers may use it less for travel discovery, instead they will prefer local guidance and spontaneity.

Cultural Purists – Purchasing behaviour at a glance

Opportunity to influence	Inspire	Shopping	Booking	**Close to time of use**	Any time
Degree of personalisation	**Very low**	Low	Medium	High	Very high
Purchasing experience	Bundle		**À la carte**		Both
Level of contact	Very low	**Low**	Medium	High	Very high
Touchpoint devices	**Inspiration-centric**		Information-centric		Any
Types of experience	Convenience	**Local**	Luxury & productivity	Luxury & wellness	Productivity	Ecological

Types of travel experience

The keywords for this traveller are flexibility and spontaneity. Travel providers should focus on delivering flexible options allowing for flight and service changes, as well as reducing the number of decisions the traveller has to make at the booking stage. It will be futile to offer 'local' experiences from a set menu, as these travellers will avoid any 'corporate' or 'pre-packaged' experiences. The airline should focus on providing a canvas for this tribe to paint on. Discovery needs to be spontaneous, so the airline should provide simple à la carte services available whenever and wherever.

The sharing economy will play a big role in this tribe's travel experience. Cultural Purists will want to remove any barriers between themselves and the local experience. They will be heavy users of Airbnb equivalents and platforms that bring travellers and sellers of local services closer together. Motorbike tours from local riders such as XO motorbike tours in Ho Chi Minh City will be preferred over large bus tours. Yelp or Trip Advisor scores will carry less weight than food recommendations from local Airbnb hosts. This tribe will not always want to use translation or navigation apps, they consider the best parts of the travel experience to be found in getting lost and having random experiences. At home, language courses months before a summer holiday would appeal greatly, along with other experiences that will increase cultural proximity.

> "The fool who travelled is better off than the wise man who stayed at home."
>
> *Rashi*

Purchasing behaviour: **Ethical Travellers**

Inspiration sources

Ethical Travellers will select only organisations and travel options that have published details of their social awareness on the environment, their working or purchasing policy, and their good track record on corporate social responsibility. Recommendations from companies such as Responsible Travel and other trusted advisors will be valuable. Members of this tribe will not avoid air travel but seek to either offset through activities such as micro-volunteering, or will select alternative modes of transport or accommodation.

Degree of personalisation

Ethical Travellers are defined by the fact that their purchasing behaviours reflect their core ethical values. These values are not homogenous; some travellers will consider some issues more important than others. It will be important to understand the nuances of Ethical Travellers and understand what issues matter most to each traveller. This will be made possible by using social data and machine learning techniques allowing for predictive analytics. Crucially, this tribe will value transparency and personal decision-making; travel providers must be explicit when and how they are using traveller data.

Opportunity to influence

Ethical Travellers already have a clear set of values and world-view that guide their decisions. Members of this tribe will already have a very clear idea as to the destinations and activities they want to avoid. When participating in any activities, they will want to understand associated carbon emissions, energy efficiency levels, and exactly where their money will go. The amount of detail this group requires will mean they will make decisions during the planning and booking stages and they will be less open to spontaneous purchases while they are on the move. They want to think through the ethical, environmental and political consequences of their actions.

Purchasing experiences

They have a set of principles that guide their purchasing behaviour, making bundling a compelling proposition for this group. À la carte offerings will certainly be considered, but this tribe will be more interested in bundles tailored to their ethical principles offered at the planning and booking stages. A bundle containing an eco-retreat, with a volunteering experience and dining at a rural commune, would be great for an environmentally conscious ethical traveller. This tribe has no problem with regular contact from the airline via the smartphone or wearable, as long as the contact delivers relevant offers or information.

Touchpoint devices

Fixed channels will be more widely used than mobile channels, as members of this tribe will want time to consider their decisions. Some Ethical Travellers may decide that service robots are unethical because they continue to drive more and more people into unemployment. Other travellers may consider service robots to be extremely energy efficient and their impact on the environment is actually less than a human in a similar service role. Beyond the ethical and societal response to the increased role of robotics, Ethical Travellers will generally be open to all sales channels. Virtual reality offers huge potential to reduce human impact on the environment and will be widely used by this tribe to plan and book holidays, and even to replace physical holidays completely.

Ethical Travellers – Purchasing behaviour at a glance

Opportunity to influence	Inspire	Shopping	Booking	Close to time of use	Any time
Degree of personalisation	Very low	Low	Medium	High	Very high
Purchasing experience	Bundle		À la carte		Both
Level of contact	Very low	Low	Medium	High	Very high
Touchpoint devices	Inspiration-centric		Information-centric		Any
Types of experience	Convenience	Local	Luxury & productivity	Luxury & wellness	Productivity	Ecological

Types of travel experience

The first consideration for this tribe is their impact on others and the environment. An artificially intelligent agent able to curate an environmentally neutral travel experience would appeal to this tribe. Travel providers today should focus on environmentally friendly and economically sustainable services and carbon-offsetting services to appeal to this tribe. Volunteering work bundled with a holiday could be appealing; any service that can be seen to 'give back to the local community' is a good fit. For example, a two-week holiday in Guatemala could consist of one week helping on the conservation of Lake Atitlan and one week relaxing on the beach of Monterrico.

By 2030, 3D printing services will be especially important to this tribe as they attempt to avoid the global logistics and transportation supply chain. Local 3D-printing services will provide all manner of physical goods and foods that use recyclable materials and have an extremely limited impact on the environment. Airlines may not always be able to offer new services to meet the needs of this tribe, but understanding what motivates this tribe will allow more effective messaging and communication. Airlines should focus on their Corporate Social Responsibility (CSR) credentials with this tribe. Ethical Travellers want to understand their impact on the world, and so simply helping this tribe compare and choose the least detrimental flight or service would meet a real pain-point.

"Travel brings power and love back to your life."

Rumi

Purchasing behaviour: **Obligation Meeters**

Inspiration sources

Obligation Meeters' travel dates and locations are primarily pre-determined by work, family, religious or holiday commitments. Based on their unique profile and characteristics from the other five tribes they will seek to learn, or be guided, to understand the options available to tailor their travel and achieve the best experience. Corporate travellers will be seeking flexibility in their corporate travel policy to personally tailor their travel plans within defined budgets or other parameters.

Degree of personalisation

Obligation Meeters require the most personalisation of any of the tribes, due to limited flexibility and specific pre-defined travel requirements. Without a high degree of customer relationship management data, a travel provider will risk poorly timed and irrelevant service offerings. Obligation Meeters are uniquely balancing between freedom and restraint. Unlike the other tribes, they have a value-system from which it is relatively easy to infer preference; this tribe do not have a core value, rather, they have an objective. The motivation to travel is different for every traveller, and so an inference is extremely risky. A traveller could stop over to watch a sporting event on a Saturday, travel on Sunday afternoon and arrive in time for a Monday morning business meeting. It is critical to understand this in order to effectively sell to the traveller. This tribe is most likely to mix business and pleasure and engage in 'bleisure' travel.

Opportunity to influence

This tribe wants extremely relevant services to be offered up at the shopping and booking stage. They want the bundle to be tailored and expect the initial bundle to be right, rather than to keep adding extras. A business traveller, for example, would want fast track, priority boarding, a checked bag, stand by options and on-board Wi-Fi. This group is also most likely to use Travel Management Companies (TMCs) or Meetings and Conference services (MICE), so would want to understand how to best manage the flexibility of work travel and add the personal leisure extras as a stand alone component.

Purchasing experiences

A personalised bundle will be exceptionally valuable to this tribe, if airlines and travel providers can do this effectively. It will be complicated to offer experiences that enable the traveller to meet the obligation and another set of needs at the same time, but the rewards will be worth it. 'Frictionless' purchasing will again be critical, as often obligations are shared with friends or family, and so key to meeting this tribe's needs is grouped booking and billing.

Touchpoint devices

The best sales channel for this tribe will be the smartphone. The obligation is clear, and so the destination and dates are already set. The traveller does not need inspiration, just a channel through which to book the travel. More immersive fixed displays such as virtual reality, tablets and holography are more appropriate for discovery. Mobile channels are perfect for Obligation Meeters.

"Adventure may hurt you but monotony will kill you."

Shahir Zag

Obligation Meeters - Purchasing behaviour at a glance

Opportunity to influence	Inspire	Shopping	Booking	Close to time of use	Any time
Degree of personalisation	Very low	Low	Medium	High	Very high
Purchasing experience	Bundle		À la carte		Both
Level of contact	Very low	Low	Medium	High	Very high
Touchpoint devices	Inspiration-centric		Information-centric		Any
Types of experience	Convenience	Local	Luxury & productivity	Luxury & wellness	Productivity	Ecological

Types of travel experience

The core pain point for this tribe is timing anxiety. Obligation Meeters will be prepared to pay extra to remove anxiety. This can be done in a similar way as for Simplicity Searchers, by taking care of the whole travel journey. This should involve autonomous or connected cars, allowing the airline to manage all timings and guarantee the traveller will arrive at their intended obligation on time and prepared.

This tribe is time-poor, Obligation Meeters do not want to go through the hassle of discovery and research. They will be open to à la carte offerings and want to fill time around their obligation. They would value a service that suggested the best restaurant or bar based on their preferences and location. A service such as

Google Now, a contextually relevant mobile assistant, is an early example of how this will work in the future. Citymapper, a UK-based travel app, seeks to make it easier for customers to move around cities, using data from all forms of transit to offer the best route to a chosen destination.

In the case of business travellers, international super-fast connectivity will be a must for virtual reality and holographic meetings. A mobile service could state if the existing connection was fast enough for a voice call, video call, or a virtual reality meeting, and show the best connections in the area. In the short-term, airlines must ensure they provide fast Internet in-flight for business travellers who want to be as productive on the flight as they are in the office.
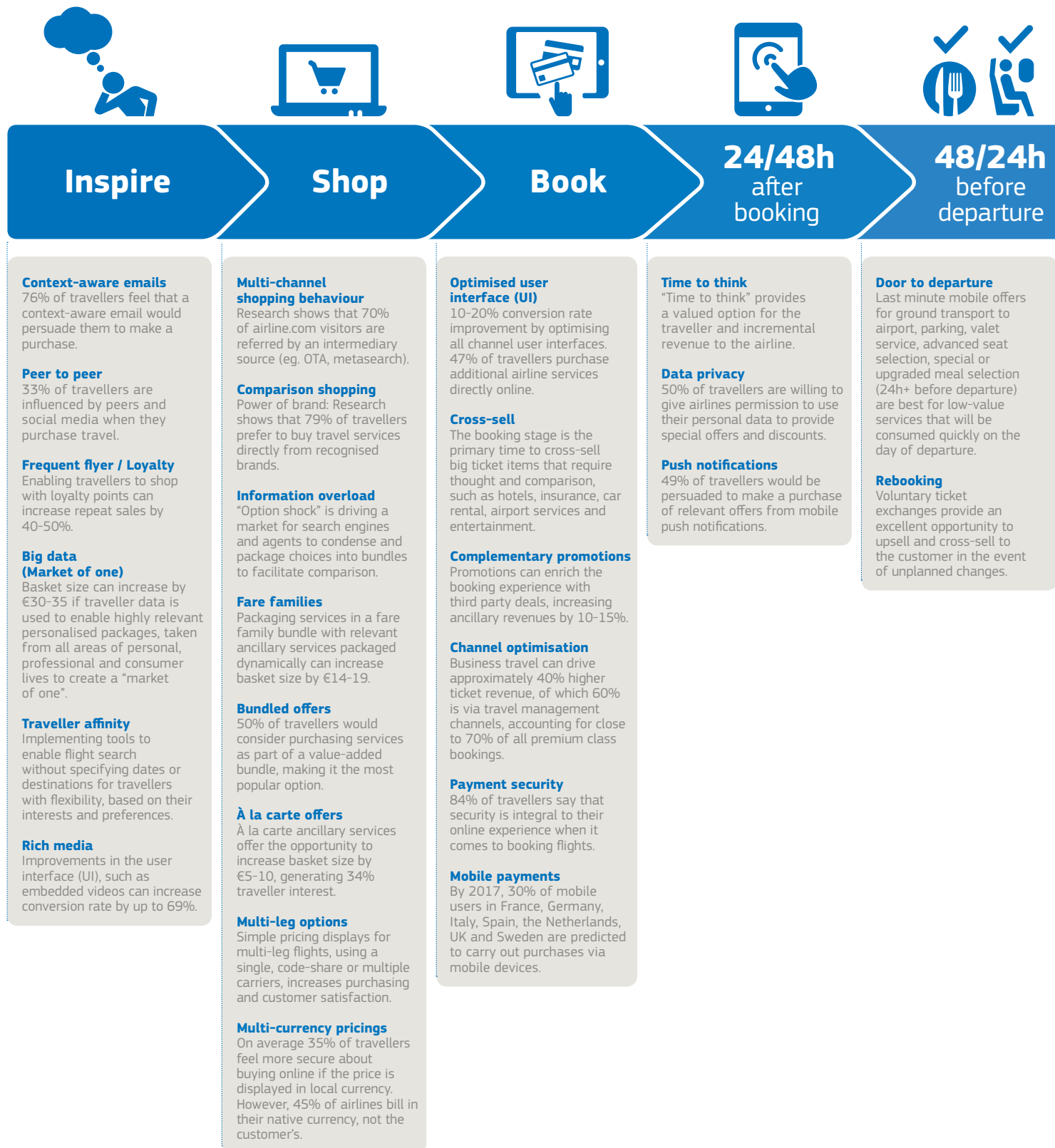
Shaping the future traveller journey

As future traveller tribe purchasing habits evolve, travel providers need to respond and build a more rewarding and connected traveller journey, from 'inspiring to arriving home'.
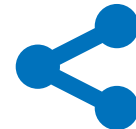
Implementing appropriate solutions and services at each stage of the traveller journey will be crucial to success. The following chart provides examples and potential benefits of various strategies to shape the future traveller journey.

Inspire	Shop	Book	24/48h after booking	48/24h before departure

Inspire

Context-aware emails
76% of travellers feel that a context-aware email would persuade them to make a purchase.

Peer to peer
33% of travellers are influenced by peers and social media when they purchase travel.

Frequent flyer / Loyalty
Enabling travellers to shop with loyalty points can increase repeat sales by 40-50%.

Big data (Market of one)
Basket size can increase by €30-35 if traveller data is used to enable highly relevant personalised packages, taken from all areas of personal, professional and consumer lives to create a "market of one".

Traveller affinity
Implementing tools to enable flight search without specifying dates or destinations for travellers with flexibility, based on their interests and preferences.

Rich media
Improvements in the user interface (UI), such as embedded videos can increase conversion rate by up to 69%.

Shop

Multi-channel shopping behaviour
Research shows that 70% of airline.com visitors are referred by an intermediary source (eg. OTA, metasearch).

Comparison shopping
Power of brand: Research shows that 79% of travellers prefer to buy travel services directly from recognised brands.

Information overload
"Option shock" is driving a market for search engines and agents to condense and package choices into bundles to facilitate comparison.

Fare families
Packaging services in a fare family bundle with relevant ancillary services packaged dynamically can increase basket size by €14-19.

Bundled offers
50% of travellers would consider purchasing services as part of a value-added bundle, making it the most popular option.

À la carte offers
À la carte ancillary services offer the opportunity to increase basket size by €5-10, generating 34% traveller interest.

Multi-leg options
Simple pricing displays for multi-leg flights, using a single, code-share or multiple carriers, increases purchasing and customer satisfaction.

Multi-currency pricings
On average 35% of travellers feel more secure about buying online if the price is displayed in local currency. However, 45% of airlines bill in their native currency, not the customer's.

Book

Optimised user interface (UI)
10-20% conversion rate improvement by optimising all channel user interfaces. 47% of travellers purchase additional airline services directly online.

Cross-sell
The booking stage is the primary time to cross-sell big ticket items that require thought and comparison, such as hotels, insurance, car rental, airport services and entertainment.

Complementary promotions
Promotions can enrich the booking experience with third party deals, increasing ancillary revenues by 10-15%.

Channel optimisation
Business travel can drive approximately 40% higher ticket revenue, of which 60% is via travel management channels, accounting for close to 70% of all premium class bookings.

Payment security
84% of travellers say that security is integral to their online experience when it comes to booking flights.

Mobile payments
By 2017, 30% of mobile users in France, Germany, Italy, Spain, the Netherlands, UK and Sweden are predicted to carry out purchases via mobile devices.

24/48h after booking

Time to think
"Time to think" provides a valued option for the traveller and incremental revenue to the airline.

Data privacy
50% of travellers are willing to give airlines permission to use their personal data to provide special offers and discounts.

Push notifications
49% of travellers would be persuaded to make a purchase of relevant offers from mobile push notifications.

48/24h before departure

Door to departure
Last minute mobile offers for ground transport to airport, parking, valet service, advanced seat selection, special or upgraded meal selection (24h+ before departure) are best for low-value services that will be consumed quickly on the day of departure.

Rebooking
Voluntary ticket exchanges provide an excellent opportunity to upsell and cross-sell to the customer in the event of unplanned changes.

> "Once you have travelled, the voyage never ends…
> The mind can never break off from the journey."
>
> *Pat Conroy*

Check-in

Corporate traveller recognition
Automated recognition of valuable corporate travellers being rewarded with priority upgrades, preferred cabin seating, fast track access and priority baggage handling.

Upsell
Upselling to a premium cabin at a discount or using less mileage, during check-in ensures monetisation of empty premium seats.

Non-peak time offers
Additional ancillary services such as fast track security, excess baggage, lounge access during non-peak hours can be offered using perfect price discrimination techniques.

Disruption management
Improve automated disruption management via mobile touch points using profile data (eg. value or urgency to facilitate the rebooking of alternative flights).

Airport

Passenger volume forecast
Predicting expected passenger volumes going through a terminal at any given time allows better crowd management of the security lines to be opened to avoid long queues, as well as to extend duty-free shopping hours.

Process automation
Improve check-in, security and boarding processes via automated self-service devices, iris scanners, bar code readers and auto-boarding gates.

Airport shopping
Personalised and contextualised airport merchandising and other third-party deals can increase ancillary revenue by 10-15%.

Near Field Communication (NFC)
Integrate airport maps, gate information, key airport facilities and partners shop promotions into mobile solutions to enhance the traveller experience before boarding the flight.

Duty Free
Integration of advanced duty-free purchase for collection on arrival to increase sales, reduce luggage and avoid liquid security restrictions.

On-trip

In-flight
Facilitate last minute upgrade options done on board and the integration of ancillary sales into the in-flight entertainment system. 40% of passengers choose to buy food or drinks on their flight.

Arrival to final destination
Share pre-defined data and passenger profile information with complimentary business partners to ensure seamless connection and service delivery of:

_ **Transportation.** Car rental, taxi services, side trip by rail or ferry and other transportation types.

_ **Accommodation.** Hotel, bed and breakfast, apart-hotels.

_ **Experiences.** Destination services such as theme parks, events, concerts, shows and tours.

Flight changes
Extending holidays is now easier with self-service rebooking via the mobile channel. Airlines can also offer earlier flight options to passengers who wish to leave earlier, thus freeing up inventory for later flights.

Post-trip

Reviews & ratings
90% of people surveyed said that positive online reviews influenced their buying decision, while 86% said that their buying decisions were influenced by negative reviews.

Customer Relationship Management (CRM)
Integrating user generated reviews into CRM to manage and respond effectively to customer satisfaction issues.

Customer Experience Management (CEM)
Incorporating traveller feedback into CEM solutions to record 'total customer value' or previous issues (eg. delays) which can then help define potential complimentary upgrades or services as a means of compensation for future bookings.

Next trip…?
25% of travellers consider the best time to plan their next trip is when they arrive home from a journey.

If you would like to know more about the traveller tribes or merchandising framework outlined in this report please contact your Amadeus Account Manager.

Conclusion · **Building a more rewarding customer journey**

This paper has sought to provide a framework for advanced segmentation strategies as airlines and travel providers in the global travel eco-system consider how to strategically build their organisations to serve the traveller of the future in the best way possible. What is clear from this report and the *Future Traveller Tribes 2030: Understanding tomorrow's traveller* report is that traveller motivations are changing and being able to deliver a more rewarding journey experience will require an intricate understanding of how that change is taking shape.

Is your organisation interested in capturing the imagination of Reward Hunters with a highly personalised luxury offer, delivered via a digital concierge during the booking phase? Or interested in building a business based on Simplicity Searchers' desire for mass market, bundled and personalised offers, delivered via a travel agent? Either way, understanding the *'What, When, Where, Who and How'* is critical to improving both revenues and the travel experience.

As the travel industry continues its journey to becoming a truly customer-experience driven sector the ability of brands to link their product, merchandising, marketing and digital strategies to a behavioural understanding of travellers will be a key differentiator. Travel providers that are able to appreciate the behavioural motivations of travellers and effectively merchandise against those motivations, at each discreet stage of the traveller journey, will be in a much stronger position.

This approach to segmentation and strategic planning requires an evolution in terms of how the industry views travellers and their needs. We encourage you to consider how this framework can help your organisation *to think differently about traveller purchasing motivations and how to build a more rewarding customer journey, both now and into the future*.

Know your tribe!

Are you a Social Capital Seeker or Reward Hunter? Find out which type of traveller you are by taking our short traveller tribe quiz! It will provide a breakdown of your personal score based around the six traveller tribes referenced throughout this report.

Amadeus.com/tribes2030

Find out more

For further information,
visit amadeus.com/airlineit
or speak to your Amadeus
Account Manager today.

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