



Future Traveller Tribes 2020

Report for the Air Travel Industry
Developed by Henley Centre HeadlightVision
in partnership with Amadeus



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1 Foreword

A foreword to the Future Traveller Tribes



What will the travellers of the future look like?

How will their needs change?

What will travel providers need to do to secure customer loyalty?

How can technology enhance the customer experience?

War, pestilence, record debts and sky-high oil prices – it seems that nothing can extinguish man's desire to travel to lands near or far, to look a distant customer in the eye or to stretch out on a far-off beach with a good book. Similarly, the trials of the past few years have served only to demonstrate the agility and creativity of the travel industry. With each new challenge comes a new service, an unexpected business model, a new way of working or a technological innovation.

The surest way to navigate this turmoil of transformation is to stay focused on your customer. In the case of the travel industry, that customer is someone who travels, a traveller. And as travel becomes cheaper, and people become richer, the word "traveller" represents an ever-growing variety of people, cultures, needs, expectations, aspirations and lifestyles.

This report is an attempt to understand how demographic, geographic and political trends might shape travellers of the future. It is intended to stimulate debate about what the future holds for the travel industry and where opportunities might lie. Forecasting experts were employed to identify and segment groups – or tribes – of traveller; four groups in particular were singled out for further analysis. Experts from the airline industry kindly devoted their time and considerable intelligence to help us tease out the practical implications of these emerging types of traveller.

Because we are Amadeus, and that is what we do, we also looked at the implications for technology. Whilst some of the technological insights are new, others are already in use but will grow in importance in the future. In particular, we believe that technology must help travellers interact more intuitively with their providers something we call the "humanisation of technology".

We hope you enjoy the report. And we hope it begins a conversation across the industry about how we'll all be travelling in the future.

Frédéric Spagnou
Vice-President, Airline Business Group, Amadeus
www.amadeus.com



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2 Our approach

Introduction to this report

Four tribes of future travellers are introduced in this report together with a description of trends fuelling their emergence and technology that could enhance travel experience from booking to arrivals.

The number and variety of people who travel has risen sharply over the past few decades. As affluence rises and travel becomes more accessible, travellers in the first years of the 21st century are now more diverse than ever.

This report introduces four traveller tribes which social, economic and demographic trends indicate will increase in importance significantly over the next 15 years. These tribes do not represent a complete map of future travellers; they have been chosen because their distinct needs highlight opportunities and issues that will be presented to travel providers.

Communication technologies, distribution systems, sensing and identification technologies continue to advance. Harnessed well, they will enable travel providers to deliver a more efficient, seamless and engaging experience at all stages of customers' journeys, at booking, check-in, in-flight and baggage collection.

In some cases, the future is already here. Much of the technology in this report already exists, although it is not necessarily yet used as described. Similarly, people fitting the description of these four tribes are already travelling. However, they are worthy of consideration because our research indicates that these tribes will have grown significantly by 2020, and because services that fulfil their needs may be applied to improve the travel experience for everyone.

How we developed the report

This report was developed by Henley Centre HeadlightVision in partnership with Amadeus and draws on the experience of experts from within and beyond the travel industry.

How we developed our thinking

A range of methods and sources went into the identification and development of these future traveller tribes and the technologies that will enhance their journey from booking to arrivals and beyond.

Henley Centre HeadlightVision carried out initial desk research to generate insight about air traveller tribes of the future. Sources included:

- Henley Centre HeadlightVision's proprietary global knowledge including:
 - **The Global Energies**, global trends in consumer and brand behaviour, and
 - **HenleyWorld**, a survey of consumer attitudes across 14 countries representing over 70% of global GDP.
- A variety of external sources including the World Trade Organisation, United Nations, Organisation for Economic Co-operation and Development, World Bank, Official Airline Guide and the Association of National Tourist Office Representatives. Final sources are at Appendix 1.

Workshops and interviews with Amadeus, airline representatives and other travel technology industry experts were facilitated by Henley Centre HeadlightVision to validate the tribes and to generate technology ideas of specific relevance to each tribe. Final technology ideas were finessed by Amadeus technology experts.



About Henley Centre HeadlightVision

Henley Centre HeadlightVision (HCHLV) is a strategic futures and marketing consultancy. It specialises in helping clients to understand the trends impacting on their future operating environments so that they can apply this knowledge to strategic planning that maximises the potential of their businesses, brands and organisations into the future.

HCHLV has a global footprint, with offices in London, New York, Delhi, Mumbai and Beijing. Its proprietary trends intelligence is gathered globally via its quantitative research partners in 14 countries and qualitatively using a network of 'Streetscapers' who operate in 40 cities across 5 continents, continually scanning their cities for evidence of fresh trends.

Henley Centre HeadlightVision is increasingly acknowledged as a centre of best practice in the area of strategic futures and scenario planning. HCHLV has developed a wide range of scenarios and other futures-oriented tools for clients in both the public and private sector, including government departments. Further information may be found at www.hchlv.com.



HenleyCentreHeadlightVision

About Amadeus

A world-leading technology and distribution solutions provider, Amadeus delivers unparalleled expertise to the travel and tourism industry, including leading-edge solutions that cover airlines' unique business needs, independent of their size, business model or market reach.

Amadeus' pioneering new-generation Customer Management Solution (CMS) portfolio, Amadeus Altéa CMS, serves network and regional carriers. The Altéa portfolio, based on a pioneering community platform concept, enables improved operational efficiency and increases revenue. The portfolio consists of the Altéa Reservation, Altéa Inventory and Altéa Departure Control solutions.

Low cost carriers also have a specific CMS - based on adaptive technology and already used by carriers in Europe and the USA - that provides robust options that easily adjust to their evolving operational requirements.

Further complementing these integrated IT solutions is the Amadeus e-Travel Airline Suite. Over 70 of the world's leading airlines use the Amadeus e-Travel Airline Suite to power over 250 websites in more than 80 markets.

Other standalone IT solutions include amongst others: Amadeus Revenue Integrity solution, Amadeus Ticket Changer, an automatic ticket reissue tool, and a full range of ticketing solutions; including e-ticket interlining and ground-handling management technology services.

More information about Amadeus' solutions for airlines is available at: www.amadeus.com/airlines.

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3 Executive summary

For the first time, Future Traveller Tribes 2020 has identified the major demographic, geopolitical, economic and technology trends that will determine who will be travelling in the future, which groups will potentially be most dominant and what their individual needs will be. Amadeus and Henley Centre HeadlightVision have produced this report to stimulate discussion about how technology can be harnessed to deliver even greater levels of service to travellers in the future.

Four tribes of future travellers have been defined, and relevant technology innovations identified. One of the most significant developments is the “humanisation of technology”, a trend which will see a breakthrough in IT systems and other communications technologies to enable the delivery of highly personalised, streamlined and flexible journeys. The report findings have been developed through a process of research, workshops and interviews with experts from Amadeus, the travel and the technology industries.



Key trends

The growth in international travel will continue to rise as the globalisation of business and growing migration fuel the need to travel abroad, and rising consumer affluence coupled with a reduction in the cost of travel brings it into the reach of more people. However, a number of critical uncertainties, such as growing concern about environmental issues and the rising price of oil, may apply brakes to this trend.

Key technology conclusions

The travellers of tomorrow will demand higher levels of control, comfort, security and personalisation from the travel experience, and the growing sophistication of Information Technology will underpin travel providers' ability to deliver to these expectations, transforming the customer experience from booking to baggage collection.

Over the coming ten to fifteen years, the following three key areas of technological development have been identified, which will facilitate a more traveller-centric travel experience. Digital personal identities based on easily accessible, up-to-date customer information will make the provision of personalised service accessible to many travel providers. An ability to offer travellers up-to-date, real time information when and where they need it via new communication technologies(such as mobile personal devices and the internet) has the potential to transform and streamline the journey. Finally, the way in which customers are interacting with technology is developing, and the increasing use of social computing and the growing sophistication of visual technologies may be harnessed to improve the travel experience.

The tribes

The four tribes presented in this report do not represent a comprehensive segmentation of future travellers, but they have been selected for discussion from a wealth of potential groups because social, economic and demographic trends indicate that they will be significant in number in the future, and because they present the most interesting challenges to travel providers.

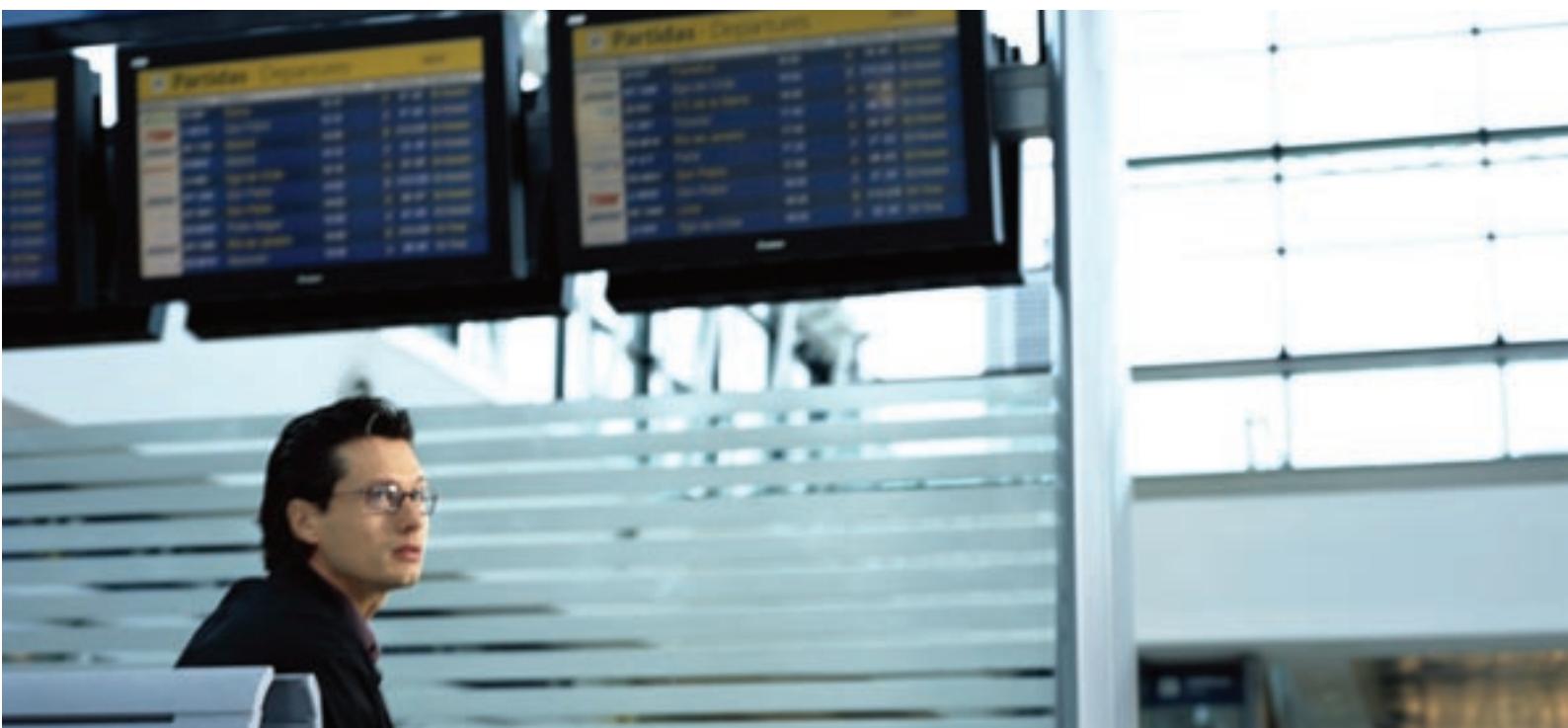
Active Seniors will be aged between 50 and 75 in 2020. As the global population ages, there will be an unprecedented number of older people travelling. With advances in science and medicine, this group will be healthier and more active than previous generations of the same age, and with higher disposable incomes, many will be taking holidays and short breaks to relax and enjoy the freedom of retirement. The physical needs of this group will undoubtedly provide a unique set of challenges for travel providers, as will their demand for a greater understanding of personal health needs by service providers.

Global Clans reflect the growth in global migration and the resulting increase in the number of individuals and groups travelling internationally to visit friends and family for holidays or to re-connect. For many, booking and price considerations will be key, but with more families travelling together, a significant challenge will be meeting the needs of young children, parents, grandparents and even great grandparents travelling together.

Cosmopolitan Commuters are the group of individuals who will be living and working in different regions, taking advantage of falling travel costs and flexible work styles to improve their quality of life. Time pressured commuters will wish to extract maximum value out of their time spent travelling, and hence convenience of booking, speed of check in and security will be high on their list of needs. In addition, the ability to facilitate work on the go and provide access to technology throughout the journey will be a key requirement of travel providers for this group. Eco-consciousness will become more important as companies and individuals work to become carbon-neutral.

Global Executives represent the most affluent of the four traveller tribes, and comprise senior executives of companies with international interests travelling in premium class, increasingly by air-taxi or private jet. Expectations of the service provided at all journey points will be high from individuals used to premium, luxury experiences. There will be an expectation of highly personalised service that meets and even pre-empts their needs. A streamlined and time efficient journey will be paramount, as will the desire to both work and relax.

This report is not intended to present a definitive vision of what the future holds, but we hope to be able to help travel providers develop a new perspective on the likely travellers of the future and their possible needs. The development and utilisation of technology will be central to this, and the gradual humanisation of technology will serve to enhance and support more intuitive customer interaction and facilitate a superior travel experience.



4 Key trends impacting the future of travel

Contextual Trends

Burgeoning global population. The world population is growing: estimates from the United Nations suggest it will increase to almost 8 billion people by 2025, an increase of about 1.5 billion from 2005¹.

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Globalisation of business. The rapid growth in world trade has led to increasing cross border traffic in goods, services, and capital. According to the National Intelligence Council in the US, the world economy is likely to continue growing on account of world trade; it is projected to be 80% larger in 2020 than it was in 2000².

This globalisation of business and politics has driven a growing need for international travel to cement and manage international agreements and alliances. The liberalisation of world trade has also brought with it a number of social changes; as countries interact, it is not only goods and services which are traded but culture, ideas and patterns of behaviour.



Growth in global migration. Growing global migration will fuel thirst for international travel. Many migrants remain strongly connected to their country of origin with many reasons to return, such as visiting family and friends. The proportion of people choosing to leave their country of birth is growing globally: according to the UN, there are currently more than 180 million international migrants; this figure is expected to reach 250 million by 2050³. Current flows show that migration to Northern America (the US and Canada), Europe and Oceania (New Zealand and Australia) is most popular, with migrants most likely to hail from Asia, Latin America/Caribbean and Africa.

Globalisation of travel and tourism. The last five decades have seen tourism emerge as one of the world's largest and most vital industries. The World Trade Organisation predicts that international tourism arrivals alone will number over 1.56 billion by 2020, with average annual growth rates in Asia and the Middle East forecasted to be over 6% between 1995 and 2020⁴.

Rising affluence. The growth in tourism is driven in large part by rising consumer affluence. As people's material needs are fulfilled, their focus turns to enjoying experiences. Household disposable income in Western Europe has grown substantially in the last decade, but it is the emergence of an increasingly well-off middle class in the emerging BRIC (Brazil, Russia, India, China) economies that is likely to have the most substantial impact on global travel in the future. For example, 40% of the population in China is expected to be middle class (household income of between US\$18,137 and US\$36,275 a year) in 2020 under current economic growth conditions⁵.

Growth in global travel predicted. For these, and other reasons, a variety of sources predict growth in global travel. For example, the global consumer and media market research agency Mintel predicts that the total number of overseas trips taken by tourists from the world's top 15 travelling nations will almost double by 2020 from 433 million to 837 million⁶. The greatest expected growth between 2010 and 2015 is expected to be in China (9.9%)⁷.

The striking growth predicted in global travel will continue over the next decade, driven by a range of social, cultural, political and economic forces.

The impact of Low Cost Carriers (LCCs) on consumer behaviour. LCCs have redrawn the air travel landscape. They have opened travel to groups that could not previously afford it. By using regional airports, LCCs have also started to compete with traditional rail networks in many markets. Certainly in developed countries, international travel is no longer reserved for the rich, and it is increasingly viewed as a right rather than a luxury.

LCCs have enabled businesses to significantly cut the costs of international travel and facilitate more face-to-face meetings. Many businesses have formalised cost-cutting measures which demand that employees travel within limited budgets.

Although the impact of LCCs has traditionally been limited to short-haul routes, they look set to extend into longer-haul journeys, with a more extensive service, offering greater comfort than is currently offered on existing short-haul itineraries.

New aircraft developments. Aircraft design is evolving in ways that will change the customer's journey. For example, larger aircraft will allow greater passenger comfort, small aircraft will give greater flexibility on routes, and more efficient technologies will enable airlines to fly cleaner, quieter and further.

The 555 passenger, two-tier Airbus A380 has 49% more floor space yet only 35% more seating than the previous largest aircraft, so seats and aisles can be wider and passengers more comfortable⁸. The A380 can fly 10% to 15% further than previous aircraft, enabling longer non-stop journeys, and produces fewer emissions and less noise⁹.

At the same time, smaller aircraft are expected to open up travel to new, smaller airports. For example new VLJ (Very Light Jet) models have increasingly long ranges and can take off from shorter runways, allowing them to operate from more airports. In the US, NASA envisages the use of VLJs as a point-to-point air taxi service¹⁰, which will become more accessible as operating costs and prices fall, driven by high utilisation and efficient turnaround rates together with innovations in scheduling, which will allow individual seats to be booked, rather than the whole aircraft¹¹.

Technological innovations are also enabling aircraft to become more fuel efficient. According to the International Air Transport Association (IATA), new aircraft are 70% more efficient than 40 years ago and 20% better than a decade ago¹². The industry is aiming to increase fuel efficiency by an additional 50% by 2020¹³.

Furthermore, the boundaries of travel are continually being pushed, with the first sub-orbital space tourism flights planned for 2009¹⁴. Resulting innovations could have implications for the airline industry, such as the development of composite materials that could be used to construct aircraft in the future, and the development of environmentally 'cleaner' bio fuels¹⁵.



Growth of air travel could be impacted by other critical uncertainties.

Evolution of technology may reduce travel costs. The requirements of travellers and consequent complexity of information management will grow exponentially. As volumes of data and transactions grow, unit costs will need to be reduced to keep technology affordable to travel providers.

This is likely to be achieved in two ways. Firstly, economies of scale will lower unit costs as volumes of data and transactions increase. Secondly, the cost of processing power is predicted to fall, at least until 2013. Between 2006 and 2012, the cost of processing power is anticipated to fall sixteen-fold.

However, the most significant and influential factors impacting information management will be the development of efficient information systems architecture, the use of commodity hardware, open source software and the public internet as a communication network. Leveraging these items will allow travel providers to afford information management technologies and as a consequence, help them to offer better prices and more comfortable and secure journeys to travellers.

Critical uncertainties

Rising cost of oil. Increased energy demand from rapidly developing economies such as China and India has pushed up primary energy prices. No new major oil fields have been found since 1976, with some commentators suggesting that peak oil production will be passed within the next few years. At the same time, world demand for crude oil is growing - from 78 million barrels per day in 2002 to 84 million barrels a day in 2005²⁰. China is predicted to consume nearly as much oil as US by 2020²¹. With demand set to reach 103 million barrels per day in 2015 and to over 119 million barrels per day in 2025, the future is likely to be one of continuing high prices²². Nevertheless, consumers have proved resilient to increasing fuel surcharges in the past few years, with air travel continuing to grow despite these extra costs to travellers.

Climate of fear. The modern world has seen the rise of the anxious consumer. People are more aware of a variety of global and local threats and issues, with information distributed by a global media keen to grab audience attention. Many believe life is becoming less safe – HenleyWorld 2006 found that 41% of respondents interviewed globally agreed that ‘I personally feel less safe and secure than I did a year ago’²³.

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Environmental concerns and sustainability issues could condition the growth of global travel.

Key fears that may impact global travel include concerns over global instability driven by international political issues and terrorism. These may further impact travel by creating the need for additional security measures, visa regulations and entry controls.

Fear of the spread of global pandemics (bird flu, SARS), which have recently been a focus of global media attention, may also impact international travel.

Impact of new communication technology. New communication technology offers an alternative to international travel but meetings conducted via this channel are currently perceived as a poor substitute for face-to-face contact. This may change if trends such as the rising need for cost-efficiency and concerns regarding global instability and air travel security converge.

On the other hand, as people become more reliant on new communication technologies, they increasingly want such technologies to be available throughout their journey. The 'always-on' culture means that customers want to remain connected at all times, whether through wi-fi, mobile telephony or satellite.

Growing awareness of carbon emissions and environmental impacts. Concerns are heightening that the earth's climate is changing, with temperatures being pushed up by man-made carbon emissions. The scientific community is broadly in agreement about the severity of the consequences, which range from the extinction of species to a growth in freak weather events. More recently, forecasters calculating the global economic consequences of a rise in carbon emissions at a rate driven by 'business as usual' have added fuel to the debate¹⁶.

Though it is yet to be agreed where responsibility for action lies, businesses in many sectors are already experiencing pressure to address their environmental 'duties', both from above, through international agreements and national legislation, and from below, as a result of civil society action.

Air travel is a particular target as it stands accused of being the fastest-growing cause of carbon emissions¹⁷. Already, some European governments are considering the development of legislation aimed at reducing carbon emissions such as taxing aircrafts or even introducing carbon emission allowances for individuals which would force them to prioritise their energy consumption and engage in carbon trading schemes.

As a consequence, some airlines are preparing their environmental credentials. Strategies range from reducing emissions via newer planes, to investigating green technologies, to offering travellers the opportunity to offset their emissions by making donations to environmental charities.

In addition there is a significant growth in environmental consumerism – the green shift. Consumers are becoming more aware of and concerned about ethical and environmental issues, and they are increasingly likely to take action. HenleyWorld 2006 found that 26% of consumers globally have reported that they have stopped buying from companies that may damage the environment, with figures particularly high in Spain (47%), Italy (42%) and Germany (38%)¹⁸.

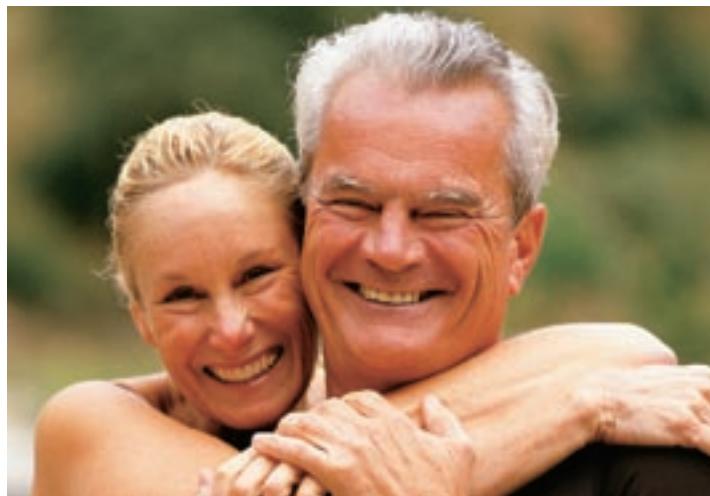
As people become more aware of the impacts of climate change, there is a possibility that some may voluntarily avoid air travel in order to reduce their carbon footprints. However, in other categories, 'ethical' consumption behaviour is not necessarily consistent with ethical attitudes, and it appears that many consumers will typically take the ethical option only when it is easily accessible, involves no loss of benefits, and does not come at increased personal cost. Thus while a minority of consumers may drop out of the air travel market in favour of greener options, many are likely to continue. This does not mean that environmental issues will be entirely disregarded: HenleyWorld 2006 found that 65% of consumers interviewed globally claimed that they would always choose the ethical option if the price of two products is the same¹⁹.

Consequently, environmental and sustainable technologies are becoming increasingly prioritised, not only to reduce carbon emissions but also as strategic investments for a resource-constrained future. Greener fuel mixes and greater fuel efficiency may ultimately reduce the pressure for a brake on air travel uptake on environmental grounds. Similarly, methods for carbon capture and storage may be developed which help to stabilise atmospheric CO₂ concentrations at broadly acceptable levels. However, such technologies are not likely to have an impact for at least ten years and it would require concerted action by governments, businesses and individuals to ensure their success.



Future travellers will be more sophisticated, knowledgeable and demanding. Affluence, education and choice will raise expectations.

Consumer Trends



Ageing populations. By 2020, the world population aged 65 and above will have trebled from its present number to 700 million people²⁴ - one in four Japanese, one in five German, French and British citizens, and one in six Americans, Canadians, Australians and New Zealanders will be aged 65 or over²⁵. In many developed nations, falling birth rates and rising life expectancy means that older people account for an increasing proportion of the total population. In Europe and Japan, the population is ageing rapidly; Japan is the first country in the world where half the population is over forty, and the UK will join them within a decade. At the same time, this ageing generation is healthier and fitter than ever before, and – at least for the moment - wealthier.

Changing spending patterns – bargain-hunting. There has also been a rise in people who are willing to ‘trade down’ in their purchases, looking for the cheaper option and even sacrificing quality or certain benefits for a lower price. HenleyWorld 2006 found that more than 50% of respondents interviewed globally agreed that ‘I look for the lowest possible prices when I go shopping’²⁶.

This has led to a growth in bargain-hunting travellers (often, but not exclusively, the young) who are willing to forego more sophisticated add-ons for a cheaper price. Internet technology is the driver of this trend as it gives access to increased offer and price transparency.

Changing spending patterns – trading up. Aspirations and spending patterns in the developed world are evolving. Increasing affluence and the media’s preoccupation with wealth, fame and celebrity means that aspirations and expectations are rising. The democratisation of luxury has led many consumers to expect premium service at affordable prices.

Search for health and wellbeing. Changing global wellbeing will impact motivations for travel and traveller needs. People crave wellbeing in an increasingly time and energy deficient culture - 43% of consumers interviewed globally for HenleyWorld 2006 agree ‘I am constantly trying to improve my health’²⁷. Leisure time has become a key opportunity to enhance wellbeing and find sense and escape in increasingly complex and hectic lives.

A likely growth in medical tourism has been predicted, driven by consumers’ desires to avoid long waiting lists or to get access to procedures that are, relative to one’s home country, free, cheaper, or legal (e.g. some fertility treatments are illegal in many countries), or which require advanced care that is not available in one’s own country. According to a study by the Confederation of Indian Industry and McKinsey, medical tourism in India alone could be worth as much as \$ 2.3 billion by 2012²⁸.



Desire for personalisation. The rise of empowered and affluent consumers in the West, and the rise of individualism, has created a culture of huge consumer choice. Customised solutions and demand for personalised products and services are increasingly challenging the 'one size fits all' mentality as a growing number of consumers in developed markets demand solutions tailored to fit their needs rather than a mass market solution. Technology is making it much easier to deliver this personalisation, and as it becomes more sophisticated consumers' demands are likely to evolve accordingly.

Sustainable tourism. Travelling responsibly means leaving the world a better place even as we enjoy local cultures. More and more travellers are seeking responsible tourism, aimed at supporting the sustained development of local cultures and protection of the environment. There is a significant growth in travel providers re-thinking tourism so that it offers travellers the authentic experience while at the same time fosters benefits for the local people and their environment.

Modal lives. Multiplying demands and opportunities mean that modern consumers lead modal lives. The same person will occupy a number of roles within their everyday lives, and with these roles come different needs and demands. For example, an individual will have a number of different travel needs at different times. Many will be exposed to different travel experiences that will impact their expectations and aspirations, for example those used to travelling business class on company missions may opt to travel economy class for leisure.

Experience economy. Modern consumers want to live life to the full. As levels of affluence climb, consumers' material needs are increasingly being fulfilled. 58% of consumers across Europe and the US agree 'I have all the material things I need'²⁹. With these needs satisfied, consumers' interests have turned elsewhere - increasingly they value experiences over possessions, both for enjoyment and to define who they are. Experiences such as travel, hold greater kudos than material goods and have become the new way to express status.



5 Travel Technology Evolution

Introduction



Humanisation of technology. An Information Technology perspective of what the future holds often presents a science-fiction vision: one that is seamlessly efficient but, at times, cold. In an era when travellers want more control, comfort, security and personalisation, there is a real opportunity for technology to deliver something else – an engaging, human-centric interface with customers. Technology is becoming available that can identify and intuitively respond to people's individual needs, and this humanisation of technology will underpin the ability of travel providers to deliver exceptional customer experience in the future.

It is also about converting travel into a simple and hassle-free experience. Today's travel industry is built and structured around experienced travellers. With a growth in travel predicted, and the continued globalisation of travel and tourism, the travel experience would benefit from being built around simpler and more friendly processes.

For example, a business traveller running late for his flight would appreciate being able to quickly reschedule onto the next available flight. If a child is flying unaccompanied, parents will want to know he is well. If a tourist is nervous about finding his way through a foreign airport, he needs to be able to find guidance. The ability to deliver such benefits and make the humanisation of travel technology possible already exists.

Key areas of technology development. With this human-centric focus in mind, we expect that there will be four main areas of focus for technology development:

- Digital personal identities (detailed customer information held digitally and therefore easily and quickly accessible), which will enable a far more personalised service;
- Integrated Information systems that combine information from a variety of sources;
- Real-time information delivered to individuals based on need and location;
- Increased customer interaction through social computing. We also expect to see a rising level of visual information technologies become cheaper and more sophisticated.

Supporting these technological developments is the continuing evolution of processing power which will enable mobile communication devices to become even more sophisticated.

Current and new technologies with a human-centric focus will be deployed by travel providers to optimise travellers' journeys.

Development of open systems architecture and web-based applications empowers travel providers to place the customer at the heart of all systems.

Of course, many of these technologies currently exist or are already under development. However, in the future we expect them to emerge as mainstream and ubiquitous, although technology adoption will vary by region and carrier segment.

Transforming the customer experience from booking to baggage collection. Developments in each of these four areas of technology will have a profound effect upon the customer journey at all four key stages: booking, check-in, in-flight and baggage collection. Thoughts about these innovations are detailed in this report, with those innovations that are specifically relevant to a particular tribe also described in the *Tribe* section of this report.

What is needed to make the vision happen. At the heart of the humanisation revolution is each traveller's sophisticated digital identity, which would be capable of flexibly interfacing with the systems that control the travel process at all stages of the journey. However, this will only be possible if the multitude of IT systems that are operated by travel providers including airlines and airports can be integrated to the degree that they 'speak a common language'.

Critically, these future technologies must also provide an infrastructure that is cost efficient to implement and manage, as the commercial pressures on the travel industry will only intensify.

This humanisation of technology offers the travel industry great opportunities to strengthen customer relationships as they prepare for the future. By deploying integrated and intelligent systems that are developed to serve customers' needs as they journey, travel providers will be able to develop services that improve customers' travel experiences.



New technologies will enable future travellers to be instantly recognised making the customer journey a seamless experience.

Trusted Digital Personal Identities

In the next few years

Tailored services and loyalty programmes. The ability to store detailed passenger information will allow travel providers to tailor the services they provide to the individual at all stages of the journey. As the customer stands at the check-in, or attempts to make changes to travel plans, fast, intelligent database analysis will enable an instant and accurate understanding of the current and potential future value of each passenger. Travel providers can then tailor their services and build customer relationships accordingly.

Personalised destination information. As customer information systems become more sophisticated and based around the individual, travel providers will be able to ensure that travellers receive personalised health information, details of leisure pursuits and other information that will enhance their journey.

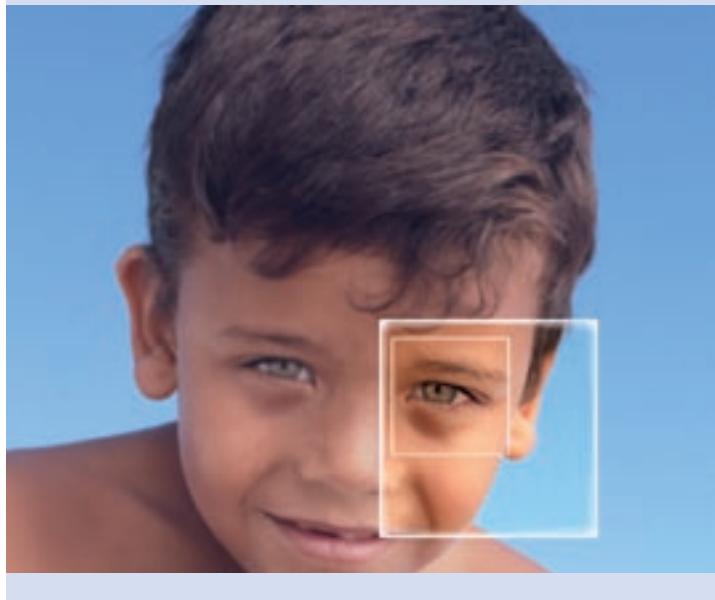
Portable access to digital identities. Easy customer recognition via devices giving access to personal details – a credit-card sized ID, or even on a SIM card or a mobile device itself, containing information such as biometric details and travel itinerary, visa status and a PNR (Passenger Name Record – an electronic record where passenger and travel data is stored) chip. This will enable passengers to feel in control, and travel companies to streamline and personalise customers' journeys. Processing of bookings online through secure exchange of data between trusted travel partner websites will be enabled; and security clearance and access to pre-purchased services will be faster and more convenient.

In the long term

Ultimate biometric identification. The development of biometrics will create the 'journey of our dreams' by utilising less obtrusive security practices. By using camera technology, airports will be able to scan crowds and recognise all travellers, eliminating the need for exhaustive check-in procedures.

Digital memories management. Massive storage and indexing technology will allow travellers to recall what they did on trips in the past, allowing them to repeat past experiences.

Integrated hand-held devices. Combined 'chip-and-go' passport and multiple PNR devices will not only allow passengers to move through the various stages of their journey quickly using swipe 'master security cards' at different points or terminals: the same card may in future be used to unlock car rentals and check into pre-booked hotel rooms.



Integrated systems that combine information from a variety of sources will enable travel providers to tempt customers with far more accessible and sophisticated offers delivered seamlessly.

Integrated Information Systems

In the next few years

Generalised online & offline merchandising. Boosted by new technologies which offer more choice and personalisation, travel sales will adopt the high street retailer approach and unbundle the traditional package of travel services. This will be reflected in proactive up-selling, calendar displays, e-vouchers and e-services developed depending on travellers' profiles.

'Natural shopping' for travel. Travel will be bought and sold as a commodity. Integrated technologies will allow sales to be pushed out to potential travellers e.g. at regular stores. The development of mobile payment systems will facilitate easier and more spontaneous shopping for travel. High street retail outlets may start to offer travel 'packages' that people can buy in the way they buy vouchers today.



Digital concierge. Through the integration of advanced information systems, travellers will be offered a single point of contact - either via the telephone or web - that will enable them to deal with any travel-related query relating to any part of their journey.

Integrated consumer-facing sales systems. Integrated sales systems will expand the ability of travel companies to cross-sell travel and ancillary services to passengers including local transport connections such as bus, train or underground passes. It could also include recommending sales promotions at travel hubs or local cultural events. Combined with knowledge of customer history, needs, location and preferences, this will enable a powerfully personalised offer to be presented to the traveller who can access and modify his plans at any point of the journey.

It will also allow for increased m-commerce, for which data service technology is used (via mobile telephony) to purchase goods/services.

Automated expenses payments. Increasingly, back-office systems will be fully integrated with payment systems which will mean that all business expenses will be recorded and reimbursed automatically and in real-time.

In the long term

Integrated airport and airline systems. Multiple systems 'speaking the same language' may connect airport and airline operations allowing speedy passage through airports, including painless check-in, free of delays caused by security checks.



AMADEUS

Mobile communication, global positioning systems (GPS) and radio frequency identification (RFID) will drive the growth of real-time and geographically relevant information.

Access to Real Time, Geo-relevant Information

In the next few years

Mobile data service technology. Using mobile telephony, real-time journey management means travellers will be proactively informed of information relating to their journey such as boarding slots, delays, etc. Family or people waiting to meet them could also be notified in case of delay. With the onset of 3G and the ubiquity of Flash applications, customers will be able to access information on mobile devices in the same way they currently do on their personal computers.

Flexible journey management. Technology enabling travel disruption management will allow journeys to be seamlessly rescheduled. Digital alter egos, i.e. a traveller's online double, will allow travel plans to be managed remotely in real-time.

For example, customers on delayed flights will be given real-time updates about potential connecting flights so they can re-book their onward travel arrangements whilst still in the air.

Or, for example, if a customer's meeting is running late, they will be able to remotely change their travel plans and reschedule flights.

In the long term

Geo-localisation technology. GPS, RFID and sensing technologies will allow providers to locate their customers and send them relevant location-specific content. This may include information specifically relevant to their journey, for example, geo-localising maps that guide people to a specific point in a travel hub, or more general content that will help them to make the most of their environment as they travel, such as shops of interest in their immediate location.

Tracking technologies for people and baggage. GPS and RFID technologies embedded in mobile devices or PNRs will enable the tracking of travellers and their baggage through their journey.

Travel providers will be able to anticipate the arrival of VIP travellers or monitor the progress of frail or vulnerable travellers who may need special assistance.

Passenger volumes through travel hubs will be better managed as RFID sensors will be able to measure flow through the airport, enabling people to be directed to secondary routes, reducing queue times.

RFID tagged baggage may be collected from a passenger's address before the flight and be waiting when they arrive at their hotel/home (advanced sensing technologies that can identify harmful substances in baggage would address security issues).



Advances in media technologies will impact the channels through which travellers can access information, and what content is available.

New Communication Technologies

In the next few years

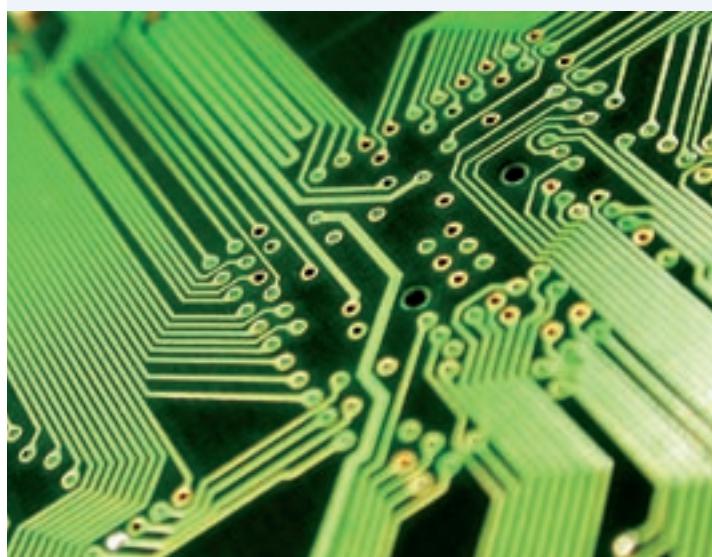
Virtual reality and gaming technologies. Simulations from gaming/virtual reality technologies will enable passengers to experience the travel process, flight experience or cultural aspects of their destinations.

A more visual culture will allow travellers to see and experience a travel destination prior to purchase. The ongoing rise of popular on-line community sites like YouTube* will raise expectations of visual content even further.

* YouTube is a popular free website which lets users upload, view and share video clips.

24/7 technology connections. Access to internet whilst on flight or at the airport through mobile devices and/or wi-fi will enable continued communication throughout the journey allowing business travellers to continue working as if they were in the office.

Near Field Communication. Short range communication will allow quick and secure identification and confirmation for payments.



In the long term

Interactive audiovisual technologies. High definition 3-D glasses or large TV screens and touch-screen technologies linked to personal identity and location for personalisation of information will become more prevalent.

Advanced self-service kiosks. New generation kiosks will be linked to digital identity, allowing check-in, itinerary changes and airport navigation prompts (via geo-localisation technology).

Cognitive computing will enable customers' emotions to be interpreted and a relevant response delivered.

Language technologies. Travellers will have the option to use speech requests in place of touch screens, and there will be much greater use of voice recognition technology, semantic translation and avatars to consult and ask questions. In another 15-30 years, humanoid self-service kiosks will take this trend further.

Wearable technologies. Chip implants and RFID in clothing will help identify the location of security targets, especially in dangerous areas or territories. It may also help track individuals through their journey, such as travellers who may need assistance. Travel providers will be able to track passenger location and movements when they are approaching the airport, navigating the airport (and may require guidance) and boarding the aircraft.



Additional Technology Innovations

In the next few years

Social computing. Increasing peer communication online and affiliate marketing will lead to consumers purchasing travel in different ways. This could range from accumulating demand for flights to securing discounts for group travel due to shared interests or culture. Issues that build with group momentum such as awareness of environmental concerns and carbon emission offsetting will also emerge.

Travellers with common interests will also be able to collaborate on their first impressions of destinations and potentially use online tools to identify fellow 'traveller' communities.

Carbon emissions monitoring technologies. Development of trading policies where travellers and travel service providers can trade emissions. For example, travel providers can pay energy providers to offset their levels of CO₂, or each traveller can maintain accounts of how much they are polluting. Additionally, the consolidation of airline companies will also reduce the risk of 'sky saturation'.

In the long term

Sensing technologies. Equipment that can 'sniff out' molecules may be used in the short-term to detect dangerous materials in baggage during security checks – such technology is already available. However, as scientific understanding of people and the world around them advances, sensing technologies may be used to identify a variety of situations, from security issues such as the presence of biological threats, to the presence of people bearing pathogens, or even a rise in stress levels, which may trigger precautionary action and provide travellers with increased peace of mind.



6 The Four Traveller Tribes

The following sections describe four future traveller tribes

These tribes have been chosen from a wealth of future traveller tribes because trends indicate that they will be significant travellers in the future and also because they will present different opportunities and challenges to travel providers.

The different needs of each tribe mean that the technological solutions which will deliver exceptional service to each at all stages of the journey, from booking to arrival, will vary.

Potential technological innovations are therefore described within the context of the most relevant tribe, although many will have broader relevance.



Active Seniors

50-75 years in 2020
(born 1945-1970)



Global Clans



Cosmopolitan Commuters



Global Executives

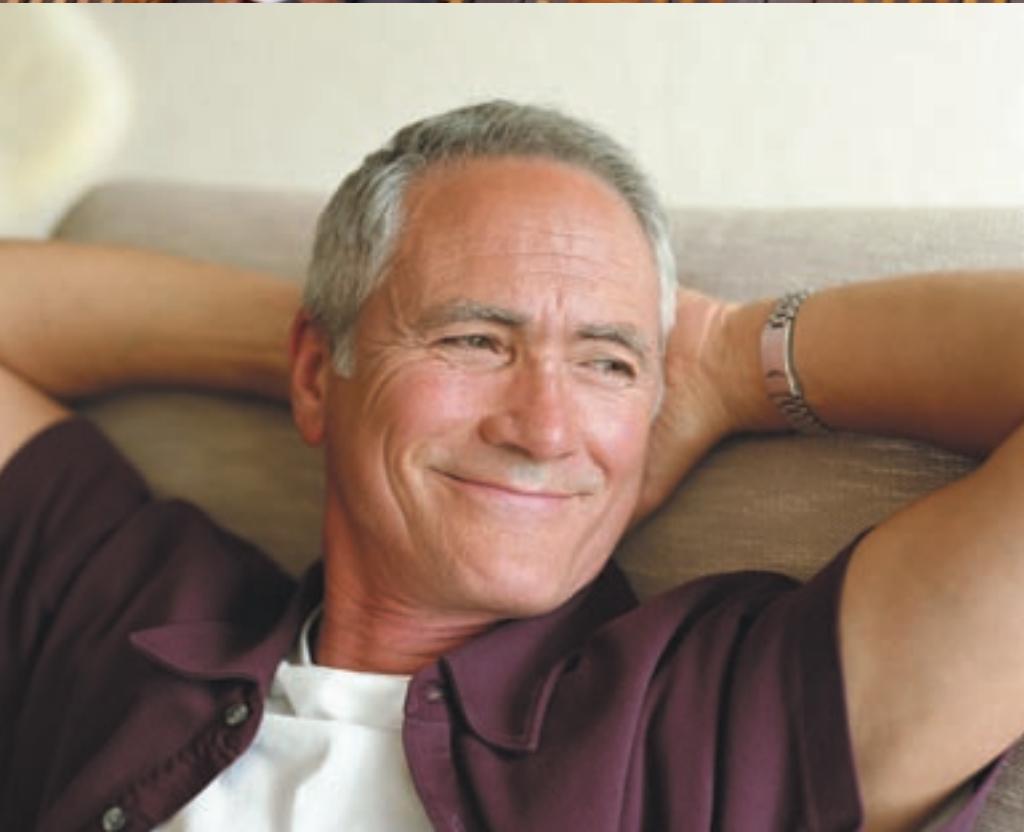
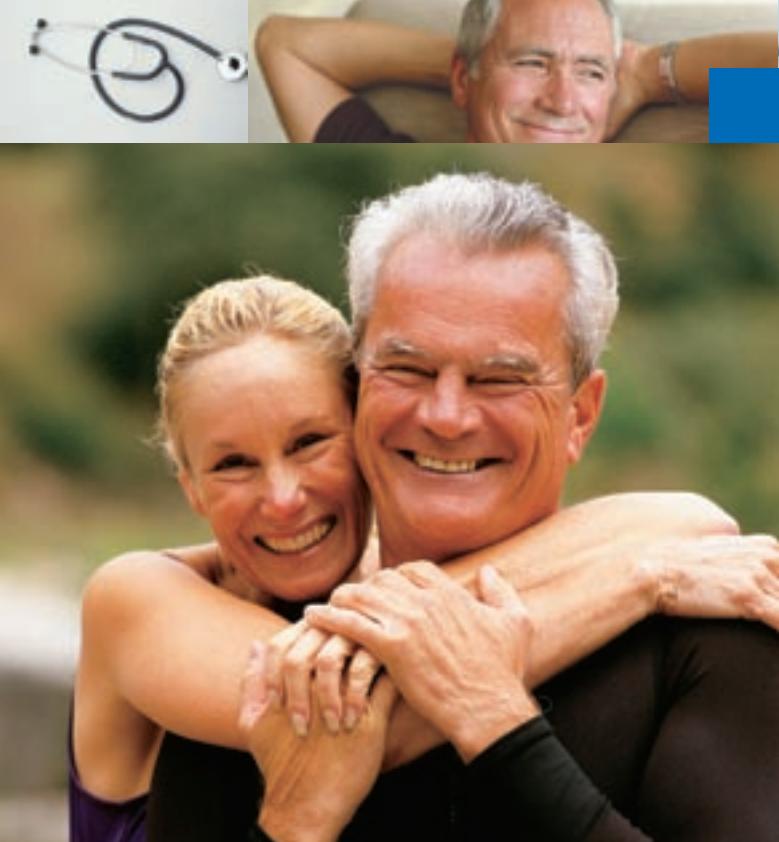


aMADEUS

Active Seniors

50-75 years in 2020 (born 1945-1970)

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



As the global population ages there will be an unprecedented number of older people travelling.

Advances in diet and medicine mean that men and women are living longer and are healthier and more active than previous generations. Many will also be wealthier. Released from the constraints of work, affluent retirees and part-time workers will make the most of the wealth they have accrued and the freedom of retirement by taking holidays.

Active Seniors in the next 15 to 20 years time will generally be more youthful and adventurous than previous generations, having spent their formative late teen/early adult years during the 1960s, 70s and early 80s. However, the 50-75 age range encompasses a number of cohorts and their attitudes (including those towards technology and travel) will be diverse and vary widely across different ages and cultures.

Senior travellers will hail from affluent regions with ageing populations including most developed countries (although rising retirement ages may impede this trend in some countries). Many will be seasoned and vocal consumers of products and services, who will have travelled extensively in their younger days. These people are likely to seek holidays with a specific focus, for example, travelling to see friends and relatives abroad, wellbeing/medical tourism, learning/cultural holidays and ethical voyages. With many more people in this broad age bracket single through relationship breakdown and bereavement, there is likely to be a surge in the number of shared interest and singles holidays catering to this affluent group.

By 2020, many more senior travellers may be from the emerging BRIC markets (Brazil, Russia, India and China) as their middle classes grow more affluent. China in particular may see a surge in outbound departures as travel restrictions are relaxed.

Active Seniors will have time to travel and may do so frequently, depending on their level of affluence. Released from the daily grind of working life, they will have time to research their journeys, often doing so online (or offline depending on region) and planning well in advance to take advantage of good deals. However, making last minute travel plans and bookings will also be common for a group with a great deal of time flexibility.

Evidence:

By 2020 the world population of elderly people is expected to have trebled, with an estimated 700 million people aged 65+ years – more than 20% of the populations in France, Germany and Japan will be over 65³⁰.

Forecasts predict that GDP in Eastern Europe will increase by nearly 2 and half times between 2005 and 2015 to US\$ 4,494bn, whilst GDP is set to more than double in the Asia Pacific region over the same period³¹.

A UK survey carried out by research agency NOP for the over 50s service provider Saga in 2004 found that two thirds of the 1000 over-50s questioned said they would travel the world and 1 in 10 would consider a trip to Antarctica³².

Key needs – price, comfort and health.

Active Seniors will have a number of specific travel needs driven by their economic circumstances and the particular physical needs associated with ageing.

With finite funds available, Active Seniors are likely to be price sensitive but they will wish to balance these needs against a desire for comfort. Although most will travel predominantly economy class, some may upgrade for special holidays or for longer journeys.

As people age, their physical needs change, giving the older traveller a unique set of challenges which travel providers can address to enhance the travel experience. Mobility issues increase making longer journeys less comfortable, from distances travelled on foot at the airport, to time spent immobile on a plane.

The acuity of senses (particularly vision and hearing) declines with age, making reading / navigation harder, impacting travellers from point of research to airport navigation.

Advances in scientific and medical understanding coupled with a lifetime's experience will result in Active Seniors who have a sophisticated understanding of their personal health needs. Many older Active Seniors will be managing long term ailments. This increased understanding of healthcare may drive up appreciation of and expectations about the healthcare that travel providers are able to provide.



Active Seniors



Relevant technology innovations

Short to medium term

BOOKING STAGE:

Customised travel itinerary. Personalised itineraries, allowing travellers to have more control over their travel experience. For example, enabling them to book a seat with more legroom for the long-haul part of their journey and a standard seat for short-haul transfers to save money. Or to pre-purchase reading material or in-flight entertainment that helps them experience their destination in advance of arriving.

Dynamic visualisation. Using virtual reality and other high quality visual imagery to allow travellers to sample the travel experience. As comfort is a key issue to older travellers, they can also be provided with dynamic imagery of seats before booking so they can choose the location and size that is right for them.

CHECK-IN STAGE:

RFID baggage tracking. RFID technology facilitates bag tracking in the airport itself and throughout the journey, reducing the need for less physically active travellers to struggle with their luggage.

SECURITY AND DEPARTURE LOUNGE EXPERIENCE:

Health sensing technologies. Wearable in-flight sensing technologies to monitor certain aspects of health or wellbeing such as heart rates or anxiety levels. In response, elements of the internal environment are altered to reduce stress points or respond to specific health needs.

Personalised healthcare services. Identify passengers with specific health needs before they board the aircraft and (in conjunction with travel insurance), allow passengers' medical records or prescription details to be available to a designated doctor or medical practitioner (who can speak their language) at their destination.

Long term

BOOKING STAGE:

Digital memories management: storage and indexing technology will allow them to recall/show what they did and experienced in the past, giving them the choice to repeat past experiences fully.

IN-FLIGHT STAGE:

Seating re-configuration. Reconfiguration of in-flight seating arrangements according to the mobility and space requirements of passengers, based on an assessment of passengers as they board the aircraft.

SECURITY AND DEPARTURE LOUNGE EXPERIENCE:

Airport navigation. Access to dedicated waiting areas following digital identification.

Personalised healthcare services. 'Medi-centres' at airports providing access to tailored health care and medication based on biometric information in 'Chip and Go' passports.





Pen portrait

Xiangmei Ansheng is a 55 year old retired schoolteacher living in Guangzhou, Guandong Province. She is married to Zu, aged 58, a semi retired senior manager for The China National Offshore Oil Company. Qiam, their 25 year old son, is a manager for the Radisson Hotel Group in Shanghai. Xiangmei and Zu want their retirement to be a new chapter in their lives, a time for adventure and freedom, and to make the most of new opportunities that didn't exist before. They remain largely in good health although Zu has a few problems related to diabetes that need to be watched carefully.

Xiangmei and her husband moved into a large privately owned gated apartment community 3 years ago, surrounded by lots of their friends. Travel plans offer status and have become one of the most popular topics they discuss. Xiangmei jokes, 'we used to sit and talk about the kids, now we talk about the best tour operators'. With China's economy booming, their disposable incomes have been growing and 'playing abroad' has become very fashionable – there even seems to be some competition among Xiangmei and her friends about who can travel the most!

Xiangmei and her family have been travelling on the mainland since the 1990s, but as her son Qiam, grew older and the laws changed, it became easier to travel further afield, and Xiangmei and her family have now been to Hong Kong, Macao, Thailand and Malaysia. With more money to spend on leisure and Zu's increasing flexibility at work, seeing the world is becoming possible. The couple are going on a 15 day organised group tour to Eastern Europe for the 27th Olympic Games in Warsaw. Zu made their reservations online and their booking reference number was sent to Zu's mobile PDA.

The couple will travel with other Chinese people and a Chinese speaking guide as Xiangmei feels reassured when things are planned and organised for them, particularly when they are so far from home. Whilst she doesn't want to be herded around from event to event, barely stopping for breath, she and Zu feel that their security and rights are more protected travelling with a Chinese group. If something goes wrong it can be sorted out by the organisers and if Zu is taken ill there are Chinese people around to sort things out.

The airport experience has become much easier for older travellers. They will receive SMS boarding alerts and will use handheld navigation devices that are programmed with their itineraries to help them get to the right place at the right time. They won't have to worry about their baggage either, it will be picked up from their apartment the day before they fly by courier service – the RFID tagging system means that their bags will arrive at their hotel before they do!

Traveller profile

Name: Xiangmei Ansheng

Age: 55

Nationality: Chinese

Occupation: Retired school teacher, married to Zu Ansheng, a semi-retired senior manager for an Oil Company



Main purpose for travel: With the huge popularity of foreign travel Xiangmei is keen to explore new and exciting destinations and keep up with the travel experiences of her friends now that she and her husband have the time and money to do so.

Past travel experience: Mostly travel on the mainland and to surrounding countries such as Thailand and Malaysia. As more destinations become viable, Xiangmei and her husband would like to venture further afield.

They are booked to fly premium economy in the peace and quiet of a 'child free zone', and intend to enjoy the European history documentary and 'Insiders Guide to Warsaw 2020' podcast they have already chosen and downloaded from the airline's 'Discover Your Destination' website. Zu feels comfortable travelling with his diabetes because the airline is fully aware of his condition, and since giving his food preferences the first time he booked, he now receives food that allows him to manage his health and also his energy levels during the flight. Qiam was happy as the airline's GPS tracking website let him check that his parents had been through each airport according to their itinerary – reassuring for both him and his parents. As their confidence grows both Xiangmei and Zu look forward to doing more travelling abroad as a couple in the future.



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.



The growth in global migration will create a future where unprecedented numbers of families are scattered across different countries and continents.

As more people migrate in search of better prospects and lifestyles, more people than ever before will be travelling to reconnect with family and friends abroad.

Global Clans will be most strongly associated with regions with large immigrant populations. According to 2005 data from the United Nations, key immigrant destinations currently are Northern America (the US and Canada), Europe and Oceania (New Zealand and Australia), with most travelling from Asia, Latin America/ Caribbean and Africa.

As Global Clans embed within their host countries, their attitudes and behaviours may change, with second generations showing hybrid lifestyle aspirations and cultural attitudes reflecting both the country of parental origin and the new homeland. However, links between families show potential to remain strong as international communication via the internet and mobile technologies becomes cheaper and more accessible.

For Global Clans, travel is likely to coincide with key dates such as national holidays and festivals when family and friends traditionally get together. These may be booked well in advance, with flights purchased for families travelling together in groups, or travelling independently to arrive at their common holiday destination. This group may also have to travel to respond to unpredictable family issues such as visiting an ailing parent.

Groups will be making plans and booking with their extended family so significant opportunities exist for travel providers to facilitate this communication and connection process. Travel will be increasingly booked online (or offline depending on region) as the accessibility of technology improves, and there is an opportunity for travel providers to facilitate the group travel process.

Evidence:

There are currently 191 million people living outside the country of their birth³³.

Over the last 25 years the number of international migrants has doubled. The UN expects that international migration will grow to 250 million by 2050³⁴.

The largest Japanese immigrant population can be found in Brazil³⁵.

The Pew Internet and American Life project (2006) found that the internet expands people's social networks and even encourages people to talk by phone or meet others in person³⁶.

Key needs – price, group travel.

Price sensitivity is key to Global Clans. Many will be less affluent and their focus for travel is family reunion rather than 'a holiday experience' which may make some more likely to compromise comfort for cost savings than other holidaymakers. They are likely to travel in economy class and many may be willing to travel at non-peak times including night time to gain cost-savings. As travel will largely be at key dates, bookings will be made in advance although unexpected family issues will mean the need for last minute travel plans for which individuals may be less price-sensitive.

Global Clans may be more focused on groups than other tribes, perhaps wishing to book and travel together. Different group members will have different needs, for example, the needs of young children, grandparents and even great grandparents may have to be catered for.



Global Clans



Relevant technology innovations

Short to medium term

BOOKING STAGE:

Web-based group forums. Travel providers could offer online forums, facilitating group communication about travel plans e.g. co-ordinating transfers to and from the airport with other groups travelling at the same time. This would also facilitate group discount bookings that allow people travelling from different places to gain discounts together plus multiple seat booking allowing them to sit together.

Cross regional booking. Allowing family members in one region to book travel on behalf of friends or family, e.g. allowing an immigrant worker to book flights for their parents and siblings in their home country for a visit during the holiday season.

Accessible and secure payment and booking. Developing innovative payment solutions that would eliminate some of the security risks associated with booking by credit card in certain regions or using cash, e.g. with the use of electronic travel vouchers.

Booking booths and new distribution channels. 'Booking booths' and vending machines in convenient locations such as supermarkets or music stores, allowing customers to book journeys easily, with details emailed or sent to mobile communications devices. Additional facilities might include the ability to cash-in air miles for an upgrade.

CHECK-IN STAGE:

Additional cargo/luggage services. Allowing those with special luggage requirements, i.e. those taking large volumes of luggage home, to book their luggage on mini-cargo planes in advance.

Airport navigation. Touch screen kiosks that operate in a number of languages providing location information and guidance through the airport.

Long term

BOOKING STAGE:

Natural shopping of travel. Travel will be bought and sold as a commodity. Integrated technologies will allow travel sellers to push their offer to the immigrant's doorstep e.g. at their ethnic stores or through their national associations.

CHECK – IN STAGE:

Airport navigation. The application of advanced language technologies will allow natural voiced requests, in local languages instead of touch screens.

SECURITY AND DEPARTURE LOUNGE EXPERIENCE:

Optimising security. Improved co-ordination of information between airlines and immigration authorities reflected through use of fast track 'chip and go' passports – a credit card sized ID containing personal biometric details and travel itinerary, Visa status and a combined PNR chip will speed up security clearance.

IN-FLIGHT STAGE:

Tailored/personalised in-flight service. Special services for flights booked at extreme hours (e.g. around relaxation). Pre-selection of in-flight films based on an understanding of passenger preferences, suggest which films they might enjoy before they book them.





Pen portrait

Esther Geronimo is 26 years old and works as a visual merchandiser for Leohman's department Store in West Los Angeles. Esther was born in Puebla, Mexico, where her parents still live. She came to Los Angeles when she was 17 to stay with her oldest brother, and has loved every minute. She has now been settled there for nine years and speaks fluent English. She sees herself as a Mexican living in America but when she goes back to Puebla she realises how much she has changed! She is much more sophisticated and what she wants out of life has definitely been influenced by her time in the US.

Esther is one of six children, three of whom now live in the US. Her parents no longer work, and they are not in the best of health. Her older sister Maria lives in Puebla and takes care of her parents. Her oldest brother married his American girlfriend and now lives in LA with their one year old son and seven year old daughter.

Family is very important to Esther - being part of an extended family gives her a secure sense of identity and she is very proud of her roots. She likes to stay connected to her family in America and back home and is always in contact with one or other of them by videomail and Skype. Her aunt lives three blocks away and like many of her parent's generation, is very keen that the children understand their roots and maintain a strong link with their Mexican heritage - she worries that Esther and her own children don't live by the Mexican traditions as strongly as they should do.

Although Esther's wages are quite low, she and her family in the States make a huge effort to travel once or twice a year. To get the best deals they buy far in advance and meet other Mexican families on a Hispanic travel forum set up by LCC airlines to bulk buy and make cheap group reservations on flights back to Mexico. Travelling in the middle of the night means they can afford to go home more often. They can also coordinate airport transfers with other families travelling at the same time. Her aunt had been reluctant to travel by air in the past, but since airlines launched their 'travel visualisation experience', she can download virtual reality simulations of the whole travel process, from check-in to airport navigation, security clearance and in-flight experience. She now feels much more familiar and secure with the travel process and looks forward to it now!

This August, five of them will be flying from LA, including her brother and his wife, a further six extended family members from San Antonio and three from Chicago. The FIFA World Cup took place in Mexico City in 2019, so they are hoping to make a trip to the new stadium when they visit home, as the whole family is soccer mad.

Traveller profile

Name: Esther Geronimo

Age: 26

Nationality: Mexican

Occupation: Visual merchandiser
for Leohman's department store
in Los Angeles



Main purpose for travel: To reconnect with close and extended family in her home town of Puebla, Mexico once or twice a year – although in the future Esther is hoping to break with tradition and spend some of her vacation time exploring other destinations, such as Europe.

Past travel experience: As money has always been tight, Esther has rarely been able to travel widely, though she hopes this will change in the future. As well as exploring Europe, Esther would love to spend more time travelling around Mexico.

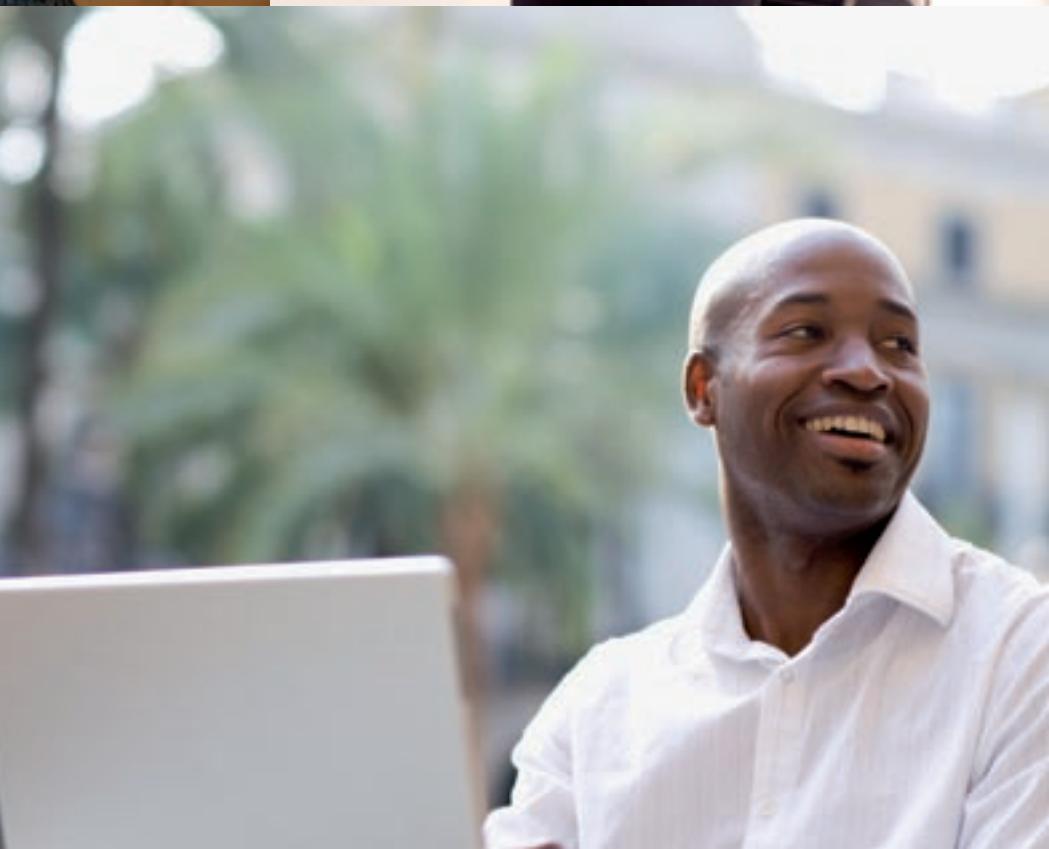
The group don't have to stay together at the airport - everyone can check in online on the Geronimos's videoblog hosted by the airline. Their airline sends an SMS to each mobile when boarding is about to begin, so Esther can take her niece and nephew to explore and not worry about missing the flight! Their airline also allows them to pre-order books and games via Amazon to keep the children entertained – these are waiting for them as they board the aircraft.

Esther gets a promotion and a pay rise next year and is considering breaking with the group tradition and going to Europe with her boyfriend Francisco. Her American friends spend little of their precious holiday time with their families and she is envious of how widely they travel. She'd like to plan her own trip to Europe but is not sure how this will go down with the family. She would love to see the huge department store displays in Paris, Barcelona and London. Esther also wants to see more of Mexico.



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.





Cosmopolitan Commuters

International commuters living and working in different regions to give themselves a better quality of life or better career prospects.

Motivated by the promise of an improved quality of life, a growing number of people will be taking advantage of flexible working arrangements and the relatively low cost of travel to live and work in different regions, for example, living in Nice, France, and working in London, UK.

This lifestyle choice will see them living in areas where they believe they will have a higher quality of life, for example in regions where the cost of living is lower than their place of earning so that their salary goes further; where the lifestyle better fits their priorities such as having more living space in less urban areas, or where the quality of life for their children is better.

They will commute short-haul distances to work on a weekly or fortnightly basis, depending on their work commitments. This may comprise internal commuting e.g. within the US and China, or internationally, such as intra-European routes from France to Germany.

Executives, freelance consultants or employees with flexible work contracts predominantly in their 20s, 30s and 40s will be most likely to make this lifestyle choice. Many will be knowledge workers empowered by cheap, fast communications technologies which allow them to work remotely.

Other Cosmopolitan Commuters will be driven by a desire to progress in the workplace and will take advantage of the rising numbers of short-term international placements offered by their employers in order to grow their experience and market knowledge. These may be commuting abroad to work and returning home to their country of origin.

This pattern of commuting is somewhat dependent on lower travel costs (although the quality of life afforded by living abroad may make price sensitivity more elastic and corporate expats may be less concerned with costs). However, it is likely to be impacted by rising efforts to reduce carbon emissions. This may influence the frequency of travel, driving Cosmopolitan Commuters to commute fortnightly rather than weekly, or forcing them to vary their mode of transport (e.g. using high-speed trains) at different times.

Cosmopolitan Commuters will travel at peak times during the week. Travel is likely to be frequent and block booked in advance for cost saving, although for unexpected business meetings, bookings will be last minute and less price-sensitive.

Evidence:

The growth in international commuting will be facilitated by a decline in fixed hour jobs: A survey for the European Foundation for the Improvement of Living and Working Conditions in 2006 found that flexible working time arrangements exist in about one in two (48%) establishments with 10 or more employees in Europe³⁷.

63% of interviewees in a European survey, reported at www.personnelzone.com, predict an increase in international commuting, where employees work in one overseas location and commute to another³⁸.

Research from the Recruitment Confidence Index found that 42% of respondents say they have increased their international recruitment over the past five years, nearly one in five (18%) say the number of staff leaving to work abroad has also increased over the past five years, and 20% of firms say it is important or very important that their senior managers spend time overseas³⁹.

Key needs – time efficiency, flexibility.

Time squeezed Cosmopolitan Commuters will not wish to waste unnecessary time travelling. Hence, the convenience of travel hub location, the ease of booking and the speed of check-in and security will influence their choice of travel providers significantly.

Cosmopolitan Commuters will need to be able to work on the go. Access to technology both during travel and at departure lounges will be vital for this group.

As business meetings will change, booking and ticket flexibility will be an important need for travel providers to consider, particularly for this frequently travelling group.

Down-time will be an important need for travel providers to cater to, as commuters return stressed from business meetings or want to wind down for the weekend.



Cosmopolitan Commuters



Relevant technology innovations

Short to medium term

BOOKING STAGE:

Real time ticket price information. Supplied via reservations technologies built into the calendar functions of handheld devices highlighting the most cost effective, convenient travel arrangements for different times/dates and across a variety of forms of transport including rail and air travel, car hire and taxis. Real-time, online comparison of ticket prices for the same route at the same time allows passengers to select the best deal.

Bundling services and up-selling. Enabling the purchase of customised packages, for example the purchase of frequent flight ‘coupons’ in bulk, or a menu based system allowing access to the business lounge - even if booked on an economy flight.

Web-based digital history - personal & travel records.

Travellers will be able to input their preferences, in addition to storing their travel records. In the future, this will allow their needs to be recognised at the booking stage, leading to the proactive provision of added services. For example, ‘city link-ups’ for time-constrained passengers and personalised information on events, activities and locations at destination that would be of particular interest to this tribe.

Environmental awareness. Airlines could offer passengers the opportunity to offset the carbon emissions of their flight, perhaps by paying a little extra on their ticket price. Rewards could be offered for passengers who regularly offset their emissions, such as upgrades. The environmental impact of different routes and aircraft could be indicated by a ‘traffic light’ system.

CHECK-IN STAGE:

Flexible journey management. Allowing those who arrive at the airport ahead of time for their scheduled flight to easily board an earlier plane following the ‘forward flow’ concept will streamline the travel experience for this time-sensitive traveller.

Optimising security. It may be possible to save passengers time by informing them in advance of how much time they should allocate to security checks or by giving a personal time slot for security clearance (and reminding them by messaging their handheld devices), in order to streamline their travel experience as far as possible.

IN-FLIGHT STAGE:

24/7 connections. Offering access to a range of communications technology such as VoIP, mobile phones, the internet and integrated laptops on-board will enable people to continue working during travel. Services may be extended via alliances which allow time constrained passengers to shop in flight, for example, buying groceries and have their shopping available for pick-up or delivery on landing.

Long term

CHECK-IN STAGE:

Self-service kiosks. New Generation self-service kiosks may be linked to digital identity, allowing check-in and itinerary changes.

Combined ‘chip-and-go’ passport and multiple PNR devices. Allowing passengers to move through airports quickly using swipe “master security cards” to speed up security checks.

Additional services. For example a ‘dating’ or professional networking facility or destination specific information that can be uploaded in-flight onto iPods or as podcasts.



Cosmopolitan Commuters



Pen portrait

David Murray, 32, is a British born, well-travelled art and design director, who grew up in Australia and has lived in London for several years. He now lives with his Czech wife, Lucia and their one year old daughter Zuza in a family-friendly yet hip area of Prague. David works for a London design agency. They settled in Prague because property is cheaper, their standard of living is better and they can be near Lucia's family who help take care of Zuza when Lucia works part time. The family are very aware of managing their carbon footprint, and live in an eco-friendly house. They don't have a car but are members of the local hydrogen-powered car-sharing pool which they use for local use. To travel further afield, they use the high speed rail network, which has improved hugely in the past decade.

Like many of his friends, David negotiated with his employer to commute between Prague and London. He currently works one week in Prague and one in the UK, as his schedule allows. He takes an H-Taxi to Ruzyně airport at 6am on a Monday morning to catch an 8am flight, and is at his desk in London by 10am. Last year, David and three other friends bought a small shared flat in London. They have a webpage where they book nights in the flat and coordinate their social lives together.

David has to be very organised. He has a reservations software package on his PDA that highlights the most cost effective and convenient travel arrangements for the dates he needs to travel across all forms of transport including air, rail and taxis. He likes to buy blocks of air tickets in advance because it is so much cheaper. His work schedule can occasionally be unpredictable, and he often has to fly last minute to a meeting at his company's office in Paris. This makes booking flexibility essential, but his home page allows him to re-schedule flights easily, and although these flights can cost a bit more, rescheduling is quick and free.

David is very aware of the environmental impact of regular short haul flights. When possible, he books amber or green flights using the traffic light system introduced in 2013 to indicate the environmental impact of each aircraft or route. The design agency he works for declared itself 'carbon neutral' in 2015 and since then, the company has offset the emissions of its sixty employees.

It's much easier to get through airports than it used to be, which is great as David hates wasting time travelling. Since his airline introduced security clearance time slots in 2013, queuing has almost disappeared. The process is particularly fast with Chip and Pin passports, and he feels safer knowing everyone has biometric data on their card. If he does get through early, as a frequent flyer, David can pay for instant access to the business lounge where he can enjoy 15 minutes in the light and oxygen bar before being sent a reminder

Traveller profile

Name: David Murray

Age: 32

Nationality: British

Occupation: Art & Design

Director at a London design agency

Main purpose for travel: David lives in Prague with his wife and young daughter and commutes every other week to London for work.

Past travel experience: As David was born in Australia, he has travelled extensively both long and short haul in the past. Now that he spends so much of his time commuting he likes to avoid too much travel in his spare time.



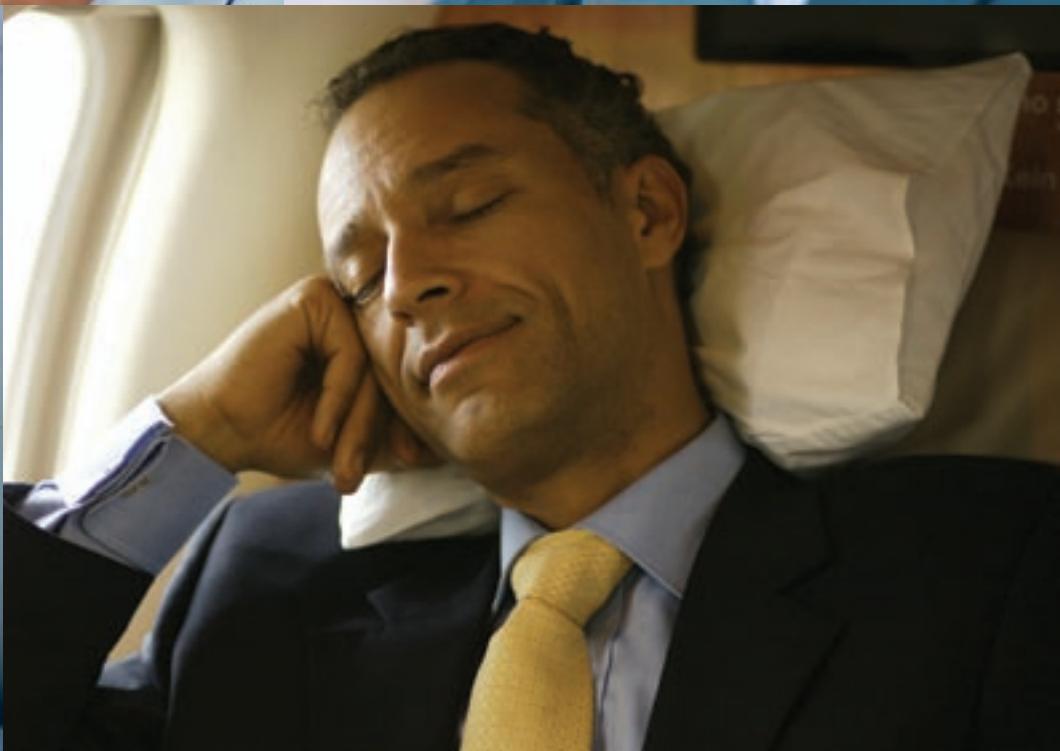
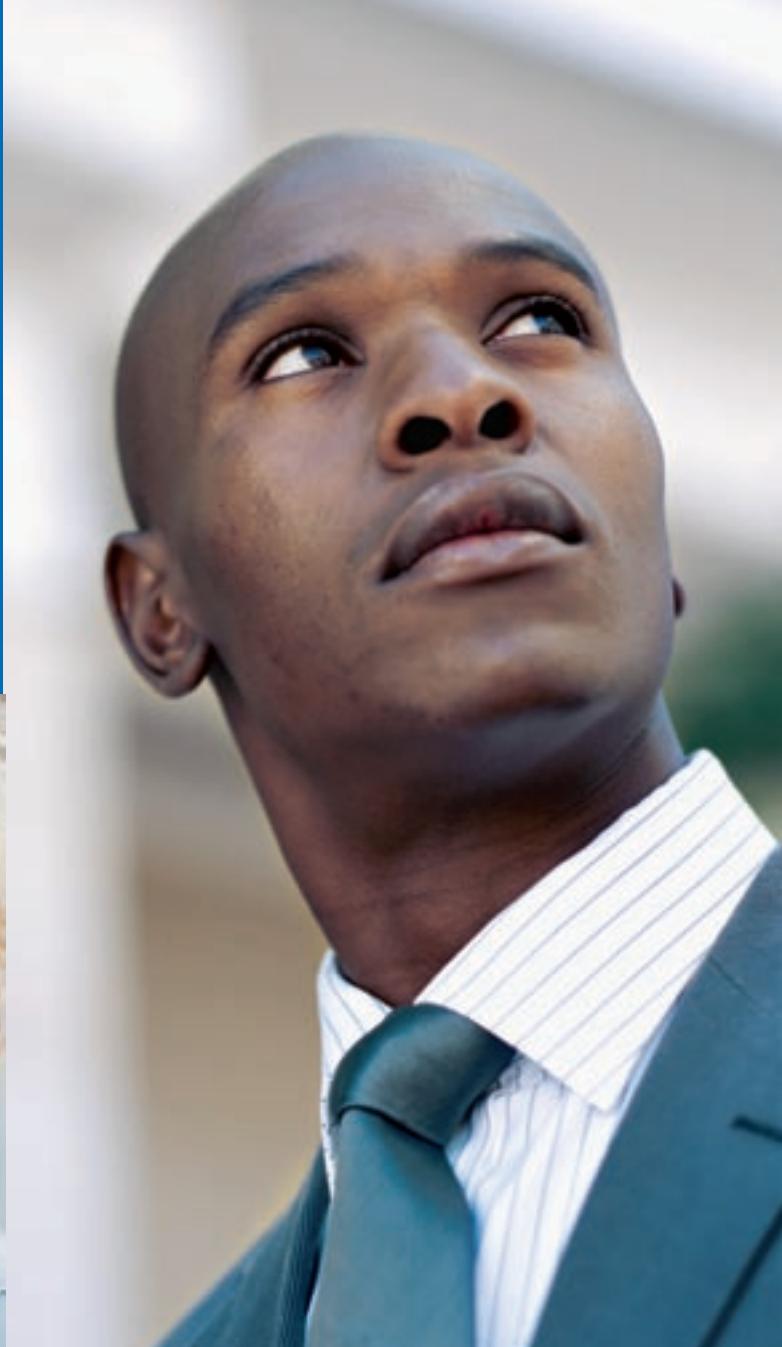
prompting him to get to the gate on time. David would find commuting much harder if technology was not available on board his LCC flight. He doesn't need to carry a laptop as even LCC's offer them in-flight, so he uses his travel time to check his emails and chat to Lucia using VoIP before she leaves for work. David and Lucia take week-end breaks alone or with friends in the Czech Republic and neighbouring countries, generally preferring to take one of the cheap, fast bullet trains. They take one long haul flight every year in the summer to see David's family in Australia. They fly economy, but choose carriers that have higher levels of service such as ease of transfer, on board entertainment and a quiet room to get Zuza to sleep.



AMADEUS

Global Executives

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



The growth in senior executives of companies with international interests travelling in premium or business class and by air-taxi or private jet.

The number of high value business travellers seeking a premium experience will increase as globalisation drives up international trade. Global Executives will be senior executives who will either travel alone, with an entourage, or with a partner, perhaps combining a business and leisure trip.

Global Executives currently typically originate from developed markets around the globe, but by 2020, growing numbers from the BRIC countries with rapidly expanding economies and business links will be in evidence.

Although they may travel premium or business class for some trips, Global Executives will increasingly favour the more exclusive, time-efficient, bespoke travel service allowed by private jet and air-taxis.

These premium travellers' main purpose for travel will be international business meetings and events although leisure may also be integrated into travel, perhaps by taking a partner, or extending their stay to catch up with friends or colleagues.

Global Executives will not be price sensitive and they will not manage their own travel booking. Trips will be a combination of long-haul (for international business) and short-haul (for domestic business).

Evidence:

According to the latest Barclaycard Business Travel Survey 2005/06 nearly half (45%) of business travellers say they are or were travelling for business more in 2005/06 than they were in 2004/05. The main reason given for the increase in business travel was business expansion overseas (33%). The survey also reveals that an increase in global business travel will boost the use of premium services: By 2015, the number of business travellers using business class services will rise from 17% in 2005/06 to approximately 33% in 2015, driven by the demand for improved service and better working conditions⁴⁰.

The number of people taking seven or more long-haul flights per year has been predicted to increase from 6% in 1997 to 14% in 2015⁴¹.

With long haul travel increasing, the number of flights taken per business traveller is predicted to increase by 12% from 7.6 flights per year in 2005/6 to 8.5 flights in 2015⁴².

Key needs – time efficiency, flexibility.

Global Executives will be used to premium, luxury experiences and will have high expectations: travel providers must be able to offer a highly personalised service that caters to Global Executives' needs including pre-empting them.

Global Executives' time is precious – they will want to do what they want, when they want, including working and relaxing. For that reason, a highly streamlined and time efficient journey – at all stages - is essential.

The need to have access to a wide range of technology is vital, both in-flight and at airport departure lounges.

As business meetings will change, ticket flexibility will be important. Flights will be booked via a PA keen to offer Global Executives a seamless experience.

Travel providers must also cater to Global Executives' relaxation and down time needs – again, focusing on creating a personalised experience with tailored premium services.



Global Executives



Relevant technology innovations

Short to medium term

BOOKING STAGE:

Superior flexibility. Providing last-minute multi-channel booking, re-booking and/or cancellations on the go.

Accessible web-based digital history- personal travel records.

Allowing the pre-emption and pre-identification of needs based on their travel history and passenger profile even if they do not fly frequently on the given carrier. This will ensure consistency of service received regardless of the travel providers that they use.

Personalised premium journey packages. Driven by the predicted growth in demand for private jets, tailored packages for Global Executives could be constructed (in alliance with private jet operators). For example, a Global Executive may be willing to fly business from Mumbai to Paris, but charter a private jet for their transfer between Paris and London.

CHECK-IN STAGE:

Information en route. Travel providers supplying podcasts that can be downloaded en route to travel hubs such as airports, providing up-to-date information on road construction, check-in status, etc.

Flexible journey management. Global Executives who arrive at the airport ahead of time for their scheduled flight will be allowed to easily board an earlier plane, following the 'forward flow' concept to streamline the travel experience.

Fast track lane. A cross-function check-in and security counters with integrated information will save time and hassle at the airports.

Optimising efficiency at security. For Global Executives, all checks and baggage issues may be handled at one desk 'simultaneously', perhaps with the use of the integrated PNR device. Alternatively baggage security screening and collection would be arranged at their private residence before departure.

Personalised welcome. GPS technologies may advise staff at departure lounges of a Global Executive's imminent arrival.

IN-FLIGHT STAGE:

24/7 connections. Offering access to a range of communications technologies such as VoIP, mobile phones, the internet and integrated laptops on-board will enable people to continue working during travel.

Networking. In-flight time would provide the perfect opportunity for business travellers (particularly those of higher status) to network with others. Information or electronic business cards could be circulated allowing passengers to identify potential networking opportunities on their flight.

Long term

BOOKING STAGE:

Advanced pricing models. Whilst pricing is potentially less of an issue for these premium travellers, jet operators could allow the scheduling of flights to provide certain cost reductions if passengers are able to be more flexible with timings. E.g. providing a 30% reduction on ticket prices if Global Executives are willing to group-share flights to the same destination at certain times.

CHECK-IN STAGE:

Wearable technologies. Chip implants and RFID in clothing will help identify the location of security targets, especially in danger – prone areas/territories.





Pen portrait

Rajesh Parikh is 42. He is married to Vina and they live in Mumbai with their 3 children, aged 11, 8 and 5 years. He is the joint managing director of Aruk Autos, one of the world's largest manufacturers and exporter of scooters, motorcycles and three-wheelers.

In 2004, Aruk Autos opened their showroom in Dubai. 'The clear-cut advantages of Dubai in general and the Jebel Ali Free Zone in particular, in terms of a vibrant business environment and a highly efficient infrastructure support system led us to our choice'. Their success, even in the context of India's huge GDP growth, means that Aruk Auto's travel needs are extensive. Rajesh often travels back and forth to Dubai, and he visits the manufacturing plants in India on a frequent basis. He also attends key business meetings in Asia, Europe and Africa.

All of Rajesh's travel is organised by his PA through a travel agent, Vimla, who is also Indian and a family friend. She specialises in business, leisure and spiritual travel for the Indian business community. Since his favourite airline formed an alliance with Shooting Star Private Jet operators, Rajesh flies First or Business Class from Mumbai to Abu Dhabi and gets a private jet for his internal flights within The Emirates. On the way to the airport, his driver downloads up-to-date traffic information to his PDA from travel provider websites which enable him to plan a best route to the airport. During their journey, their location is tracked by GPS and sent directly to the Premium Business Lounge so they know he is on his way. They will have his favourite vegetarian food waiting for him, and will automatically schedule his slot in the fast track Premium traveller security check.

Rajesh's time is precious to him, and when travelling in Business or First, he likes to combine work with leisure. The in-flight technology is now so advanced that he can easily take part in video conferences with colleagues in Europe, Africa or Asia in flight. His PA also pre-selects the e-business cards provided on the airline website of some of the passengers travelling on the same private jet as Rajesh who look likely to be useful business contacts. They are seated near each other and can enjoy some time networking. Rajesh likes to relax too: he is a devout follower of Dada Jeyshen, an Indian guru, so he likes to take some spiritual time out in the meditation lounge. His in-flight entertainment (films, books, magazines) were selected by Vimla in advance and were waiting for him at his seat, along with a glass of his favourite, freshly-squeezed herbal energising juice.

He likes the fact that his airline treats him like a VIP – if he has to travel at the last minute they recognise that he is a high value customer and always make room for him on the flight he chooses.

Traveller profile

Name: Rajesh Parikh

Age: 42

Nationality: Indian

Occupation: Joint Managing Director of Aruk Autos, a scooter manufacturer and exporter



Main purpose for travel: Rajesh travels extensively for work, and always in First or Premium Class. He also ties in family visits with business travel, especially for weddings, religious festivals such as Diwali and other celebrations.

Past travel experience: Rajesh has travelled widely in the past and with his status he has very high travel expectations – including personalised services.

His personal travel page hosted by the airline also allows his PA to update his travel preferences and needs so his airline can continue to meet and pre-empt them when he travels, ensuring the highest level of personalised service.

Rajesh and his family are prolific travellers, for business and leisure. Rajesh has always travelled extensively for business, and to visit family abroad. He ties business trips into family visits, especially for weddings, religious festivals like Diwali and other celebrations. Vina and the children often travel separately to visit Vina's relatives in the USA and UK. They fly business or premium economy, accompanied by a maid who flies in the same class. They use the school holidays for extended trips to visit family abroad, where Rajesh will join them as business permits.



7 Conclusion

The intention of Traveller Tribes 2020 is to start a dialogue within the travel industry about the future needs of its customers. One thing is clear - the demand for travel services will continue to increase against a background of dramatically changing geo-political and social conditions.

It is also clear that technology has a major role to play in bridging the gap between travel providers and consumers. The need for the humanisation of travel technology is a major theme to emerge from this report. This means technology which is developed to support people when they are travelling in a way which enables high degrees of personalisation and exceptional customer service.

We put forward Traveller Tribes 2020 as a means of helping us all focus on the complex challenges facing the travel industry through the eyes of the people who will use our services. People, who whether they will be making journeys for business reasons; to enjoy family reunions; or just to have the trip of a lifetime all want to be treated like individuals.

We greatly encourage feedback from the industry, from around the world.

<http://www.amadeus.com/travellertribes>



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Full list of tribes

The tribes were developed as follows:

Desk research was conducted to gather information about travellers now and projections into the future.

This information was synthesised into a matrix showing future travel occasions (comprising basic demographic details of traveller, with whom they would travel with, for what reason and key flight details: long/short haul, domestic/international, economy/premium) for both leisure and business travel.

This matrix enabled the identification of a number of key travel occasions that are predicted to grow into the future.

For leisure, these are:

1. Gap year / career breaks. Younger people are undertaking medium term (6-12 months) independent international travel for relaxation, adventure and to broaden their experience. Often low budget, and typically covering a number of countries, it may include paid or voluntary work overseas.
2. Lone leisure holidays. With the growth in numbers of people staying / becoming single, a rise in numbers of individuals taking short holidays alone can be expected.
3. Retiree holidays. As the global populations ages, there will be a rise in healthy and active retired people taking holidays and short breaks, both domestically and abroad, to enjoy life and the freedom of retirement.
4. Visits to family & friends. With rising global 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.
5. New family holiday. The traditional family structure is in decline – many households now comprise ‘alternative’ and extended families. This may drive a rise in new family structures of people holidaying together.
6. Couples holidays. With a trend in many countries towards postponement of children, there will be a rise in couples travelling together on short weekend breaks or longer holidays.
7. Adult group holidays. Groups of adults taking holidays together; friends wishing to share time and an experience, or adults with a common leisure or lifestyle interest.

For business travel, a number of variables were taken into account. These included different levels of seniority, frequency, long/short haul travel, class travelled, domestic/ international, alone/with others, business/business and leisure.

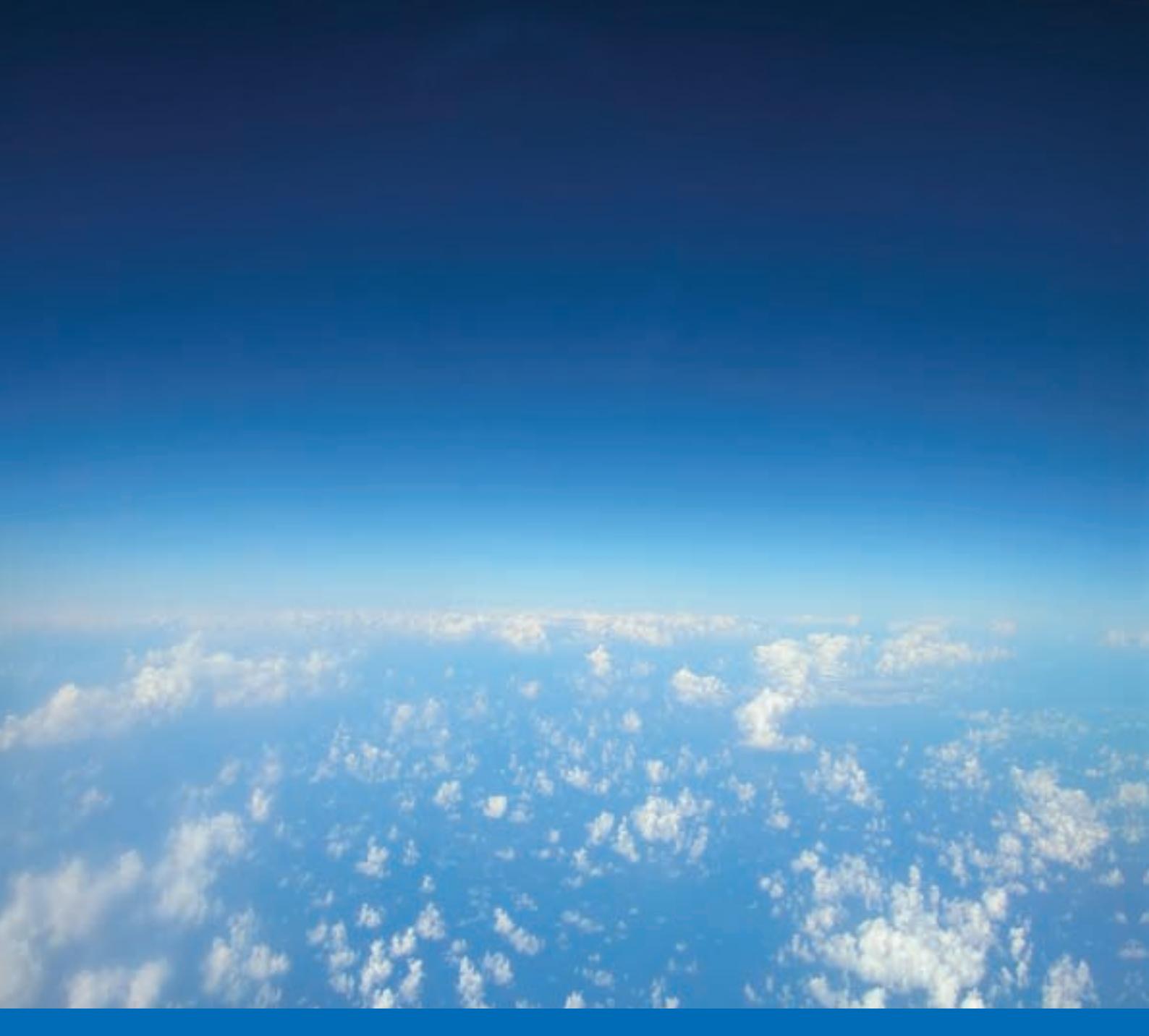
Although a range of tribes could be identified using these variables, key tribes identified were:

1. Value-seeking business travellers,
2. International commuters (a subset of 1),
3. Premium VIPs (Global Executives).

The four key traveller types were chosen by evaluating all against criteria including:

- Impact of future demographic change,
- Most distinctive demographically,
- Profitability for the travel industry,
- Potential to be most interesting when considering technology innovations which fulfill their needs.





Future Traveller Tribes

Report for the Travel Industry

Developed by Henley Centre HeadlightVision in partnership with Amadeus

For more information:

mediarelations@amadeus.com

www.amadeus.com/travellertribes



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