FUTURE TRAVELLER TRIBES 2030: BEYOND AIR TRAVEL

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Contents

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ABOUT THE AUTHOR

Martin Cowen is an experienced travel industry journalist having covered the industry for over 15 years. He has written for a range of industry titles including Airline Business, Buying Business Travel and Travolution. Whilst editor of online travel news site e-Tid.com Martin was awarded a Business Travel Journalism Award for industry news journalist of the year, while e-Tid.com won the electronic news publication of the year award. Martin is presently a freelance writer for TNOOZ and a range of other publications.

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INTRODUCTION

Everybody's habits, needs and preferences are just a little different when they travel. Window or aisle seat? A preference for a room on a higher floor? An automatic or manual transmission rental car? Pad thai or tuna maki rolls? And those preferences might be different if an individual traveller is making their journey for business or leisure.

Gaining insight into the traveller is critical for providers in order to tailor and deliver a great service that brings customers back. So that's why last year Amadeus commissioned the Future Foundation to write 'Understanding Tomorrow's Traveller',

a paper that unveiled the six Amadeus Future Traveller Tribes that we expect to emerge by 2030.
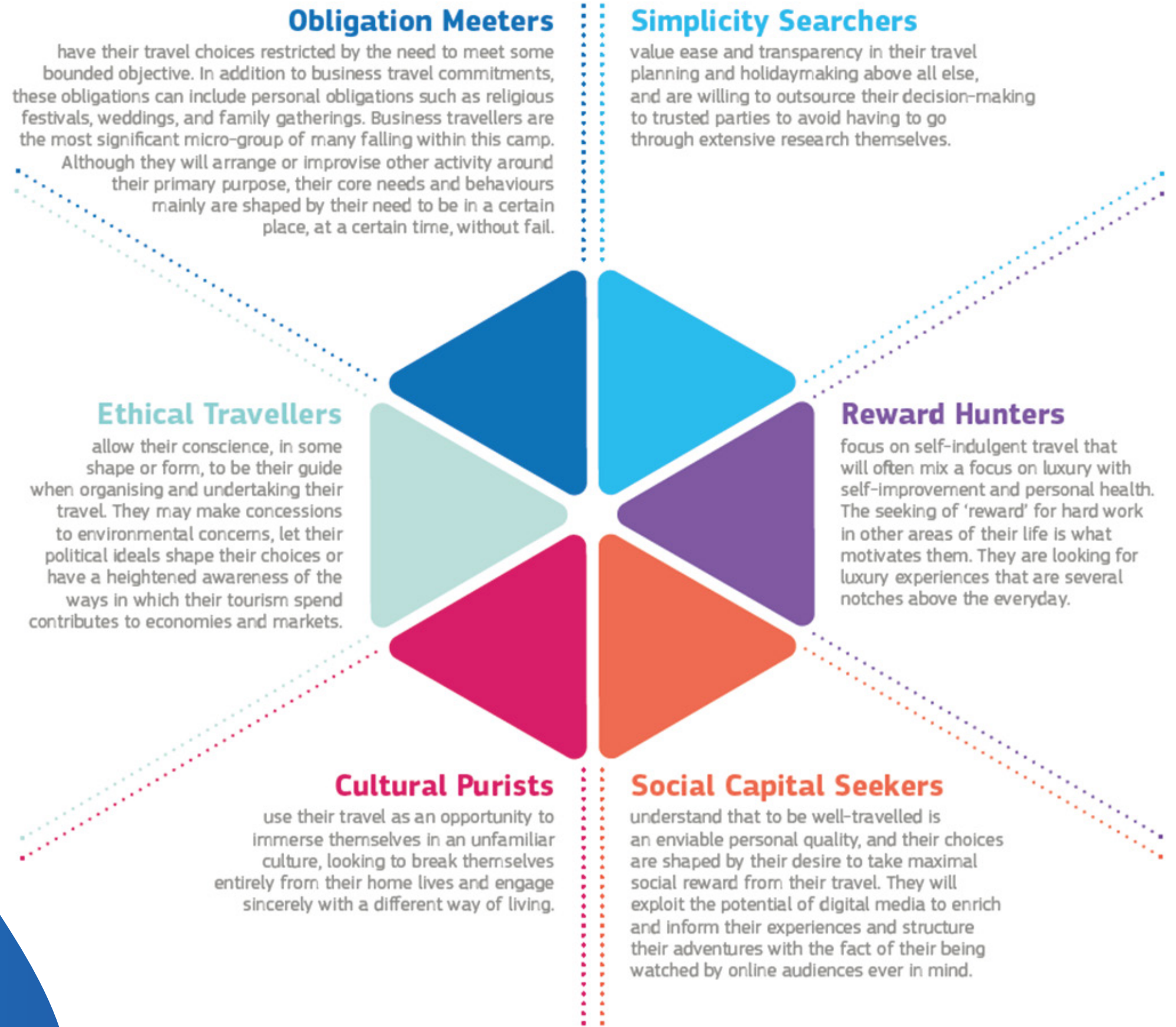
Subsequent papers analysed the impact of these tribes for airlines and the luxury sector. In this, the fourth paper in the series, respected travel industry journalist Martin Cowen has looked at how the tribes might reshape other industry segments, including hospitality, airports, rail and cruise.

Designed to stimulate thinking and discussion across the various sub-sectors of our industry the paper draws on the views of a wide range of senior industry leaders who have shared their reactions to the potential impact of the six traveller tribes across their specific areas of the travel industry.

At Amadeus we believe that futures research is a vital tool that enables us to work with our customers and partners to shape the future of travel. I encourage you to read this discussion paper and to consider if the trends identified can be applied for the benefit of your customers, colleagues, partners and shareholders. However, the research we commission only reaches its true value when it prompts wider engagement, discussion and debate across the travel industry. Therefore I also invite you to provide your feedback and perspectives on the issues raised within this paper on our blog, across our social media channels and via your Amadeus account manager.

Ben Hunt,
Director, Group Communications,
Amadeus IT Group

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FUTURE TRAVELER TRIBES 2030: UNDERSTANDING TOMORROW'S TRAVELLER

THE SIX TRAVELLER TRIBES

Obligation Meeters

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

Simplicity Searchers

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

Ethical Travellers

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

Reward Hunters

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

Cultural Purists

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

Social Capital Seekers

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

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AIRPORTS, IN-FLIGHT, IN-DESTINATION

The importance of the airport and in-flight experience as part of the overall journey continues to grow, with travellers expecting to be kept informed, entertained and safe. In-destination travellers arrive with a wealth of knowledge about where they are staying and a range of devices to provide real-time advice.

Previous papers in this series have looked at this in detail, but here's a reminder.

Scenario

Simplicity Searchers

This tribe is interested in the destination and the journey is a means to an end. They want to be led around the airport and their smartphones or wearable device will be a navigation aid, not a channel for marketing messages from duty-free retailers.

Simplicity Searchers will continue to fly the flag for bucket list tourism. First-time travellers to major destinations will want to see the Eiffel Tower, Times Square or Sydney Opera House. Off-the-beaten track is not why they travel.

Cultural Purists

More likely to be wandering the back streets of Shoreditch than queuing at Madame Tussauds, this tribe has a functional approach to the airport experience and might even seek out smaller, less commercial departure and arrival points to avoid the crowd.

When on the plane they are more likely to be reading bookmarked blog posts on their tablet than watching the latest Hollywood chick-flick on the in-flight entertainment.

Once they get to their destination they will head off to where they think the locals hang out, avoiding the taxi queue and instead choosing a bus or rail link, taking them to their homestay or independent hotel.

Social Capital Seekers

This tribe is a marketer's dream, and airport operators and their partners can benefit from the fact that this tribe is always connected, available and digitally responsive. They are more willing than most to share personal data and are receptive to marketing messages, so long as they are relevant.

In-flight Wi-Fi connectivity is likely to become widespread over the next few years. Airlines can use Social Capital Seekers as ambassadors, but need to be aware that any shortcomings in service will be tweeted, real-time, before the flight has landed.

Reward Hunters

The airport experience demanded by Reward Hunters is a VIP-level of service, bypassing the usual security queues, check-in procedures and wait-at-the-gate. They want to breeze through the airport and take to the air without missing a beat. In-flight they will expect gourmet food, fine wines, the latest movies and the most attentive service.

Obligation Meeters

The airport is a functional element of their trip, and this tribe is likely to include experienced travellers. They will expect initiatives such as the US Trusted Traveller scheme to be in place around the globe.

Ethical Travellers

Ethical Travellers like to know that their travel choices are as sustainable as possible. To meet the expectations and needs of this tribe, airports must take steps to ensure they reduce, as far as possible, any negative effects on the environment from their operations – and that they communicate these efforts effectively to travellers.

Sweetspot

They will expect directions to be delivered in their native language – of particular importance for new travellers from emerging markets. Airports with responsive digital signage, or which offer translation apps, can keep things simple. Translation apps also come into their own when on the road, from asking directions to deciphering a menu.

Cultural Purists are interested in exploring the lesser known attractions that a city has to offer, as evidenced by the growing number of local guides and tour services. Tourism boards and their partners need to adopt an informal and alternative tone to their marketing efforts to promote a city's hidden gems.

In-destination, hotels can incentivise guests to share their experience on social media with free drinks, discounts or bonus loyalty points. Over time this relationship between the hotel, the Social Capital Seeker guest and their social network will become more intimate and sophisticated.

Airports already offer some of these services for royalty and A-list celebrities – Reward Hunters expect to be treated in the same way and will pay for the privilege. Airlines are capable of offering luxury to first-class passengers but will need to be able to provide this quality of product to more of their passengers.

Easy check-in is also a given – some airports have trialled location-based Bluetooth check-in – similar schemes again need to be rolled out more widely for this tribe.

Engaging with this tribe is a positive step, and communication and awareness are key. Airlines and airports should not only communicate the steps they take to increase the sustainability of their operations, but should also highlight and emphasise the socio-economic benefits they have on the local and global environment. By doing so, they will be able to provide a meaningful offer to the Ethical Traveller.

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TRAVEL AGENTS

At the dawn of the internet, travel agents were seen by many observers as one of the professions most exposed to the new digital world order. But travel agents have certainly not disappeared. They are disruption veterans and transformation experts, and still account for a large proportion of the global travel market.

If we extend the definition from the traditional bricks and mortar agent to include online travel agents as well, then the sector is in even better health. Online travel agents (OTAs) have democratised travel, bringing a range of content to the desktops, laptops, and smartphones of billions of people worldwide.

Online travel agencies have provided the spur for traditional agents to up their digital game and most successful high street agents have a virtual footprint as well as a physical presence.

It is also worth noting that some online travel agents have a hybrid approach, with call-centres generating sales as well as offering customer service, and online travel agencies in some regions even opening a brick and mortar location to improve customer service, trust and loyalty.

Agents, online and offline, can also be broken down into leisure and business, although the lines between the two are becoming less distinct. Business travel agents have morphed into travel management companies and offer a range of services beyond booking flights and hotels.

In the same way as leisure agents blend the physical and digital, so do their business-focused peers. Self-booking tools exist alongside call centres, with itinerary mobile management apps, expense management tools, Duty of Care services, automated carbon reporting, and other personalised features also offered to travellers.

Comparably speaking, a blended approach via a mix of self-service or corporate self-booking tools complemented by an assisted service via physical agents co-exist to provide a plethora of value added services to the corporate traveller. The worlds of off and online work exist in tandem in the managed travel space to provide a complete service offering to the business traveller.

Each of the tribes will have a different understanding of and expectation of a travel agent. Different age groups within the broader tribes will fragment the definitions yet further.

Scenario

Simplicity Searchers

This is the obvious tribe on which travel agents should concentrate. When the idea of the tribes was first introduced, agents were a part of the definition. 'Simplicity Searchers...' are willing to outsource their decision-making to trusted parties to avoid having to go through extensive research themselves."

High street agents have long been seen as curators, with the ability to hone in on exactly what the client wants, based on their personal knowledge of the client. Agents were sending families on their summer holidays long before sophisticated CRM systems were able to automate suggestions based on preferences.

For some people who like the reassurance of human interaction, who get overwhelmed by the online choice or who are not comfortable transacting online, the simplicity of an agent is appealing.

Cultural Purists

Cultural Purists take pride in avoiding the mass market, both in terms of how they book and where they go, but agents should not dismiss these tribes so readily. A well-positioned and specialist agent, using a mix of natural and paid search, as well as offline advertising in specialist publications, has a role to play with this type of traveller. Great connections to destination services and unique content will be the key to convince them of your value.

Social Capital Seekers

If a traditional agent can make the shopping experience exciting enough to be shared then there might be some traction with Social Capital Seekers, who like to let everyone know everything about their trip. High street agents are already looking at immersive retail experiences to sell travel, and this will appeal to a tribe and their social network.

Reward Hunters

This tribe might easily call upon the services of a luxury travel agent to arrange their trip. By definition, they see travel as compensation for their busy, high-achieving lives and people with a busy life do not want to spend hours searching online for the ultimate spa getaway. Similarly, while travelling, this tribe do not want to wait for services or transport and will be willing to pay a premium for quick, high-quality assistance.

Agents who operate in this sector will need to have access to unique and boutique properties, business or first class seats, helicopter or limousine transfer providers.

Obligation Meeters

In a business travel context, Obligation Meeters have one aim in mind, and that is simply to optimise the end-to-end journey. From booking flights via their preferred channel to remaining connected on the journey, ready to accept options which facilitate their trip, managing a business trip for the Obligation Meeter is about efficiency and service, right through to the processing of the expenses.

Ethical Travellers

This tribe might baulk at walking into a high street agent or phoning a call centre, thinking that the holidays on offer will be mass-market and out of synch with their environmental demands. But online there is a community of like-minded people who can share recommendations and links to agents – online and offline – who can meet this tribe's demands.

Suppliers who have a strong sustainable story to tell need to make sure that their brand is present in the channels where this tribe congregates.

Sweetspot

Simplicity Searchers
Online and offline travel agents need to make sure their entire inventory can be accessed via mobile, web or an app to make the search and shopping process easy for Simplicity Searchers.

Cultural Purists
Small-scale tours and activities operators, independent hotels and hostels as well as local business directories have a presence which would be very attractive for established agents to aggregate and push out towards Cultural Purists. The technology and the offer should be engaging enough for this traveller to want to buy; investing in marketing will be key.

Social Capital Seekers
Travel agents who take part in online and public conversations with Social Capital Seekers could see their expert advice go viral and reap the rewards. Savvy travel agents will reach out to customers while they travel and encourage them to share their experiences with holiday competitions that reward participants with the best Instagram posts.

Reward Hunters
Upmarket luxury offline travel agents with a call centre and responsive web site could advertise in targeted business magazines to get their brand in front of the Reward Hunters.

Obligation Meeters
Technology needs to be made the most of throughout the travel process, from online booking to a solution which automates expense. In addition, prompts such as an upgrade, lounge access, or allowing travellers to change their own tickets, can make a noticeable difference for the Obligation Meeter. Technology helps firms to contribute to their employees' wellbeing by removing much of the stress around business travel.

Ethical Travellers
Online travel agents would do well to engage with their suppliers to validate and promote sustainability credentials. That way Ethical Travellers can make an informed decision about their choice of hotel, airline or experience.

TRAVEL AGENT

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CASE STUDY

Subramanya Sharma

Chief Marketing Officer, Cleartrip

Indian online travel agent Cleartrip has a very clear "mobile first" approach to its business, and this drives how it segments its customer base. All commercial, marketing and product decisions are taken with this in mind. Its engagement with the tribes is all within the context of the wider, mobile-based segments.

And the level of segmentation around mobile is becoming increasingly sophisticated, in a way encouraging a deeper level of granularity when thinking about the tribes.

"We think of our customers in terms of devices and platforms," said Sharma. "Another breakdown is mobile web and apps; we then segment further between the platforms people use, which is mainly [Google's] Android or [Apple's] iOS.

"And we can take this further into devices – so someone with an Apple Watch is a different proposition than someone with an older iPhone.

"We can map transactions to devices, so we pretty much know the price point for the customer. We can use that data for personalisation in how we market to that segment and what products we offer.

"So for example, trains are big in India and the biggest platform by far is Android. On the other hand, we sell a lot of five-star hotels to people with an iPhone 6.

"This creates a wealth of segments, each of which can be targeted to such a degree that Cleartrip is getting close towards having a personalised relationship with each customer. The idea of the tribes can help it get even closer to truly one-on-one marketing.

"We like to offer one-click purchase for SMEs and business travellers, which works for both Simplicity Searchers and Obligation Meeters. But to do this we need our customers to have a customer's credit card details stored, which makes this one-click purchase appeal to the Reward Hunters.

"But we are also finding that the Reward Hunters buying high-ticket items such as flight plus hotel will also like to talk to someone, so we have to offer a service proposition as well."

In addition, Cleartrip has recently launched a new product, Activities, which speaks directly to the Cultural Purist tribe: "Being a mobile first company, Activities was launched as an in-destination mobile product to the unbundled package traveller who is looking to impulsive local experiences rather than a pre-planned itinerary. This could appeal to the Cultural Purist, who would want to experience local in a way that connects to him at a personal level."

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Travel&Co is a venture-backed holding group which owns a number of upmarket businesses, including: Australie Tours, France's number one specialist in travel to Australia and New Zealand; Terres de Charme, their bespoke travel business; Alma Latina, specialising in South America; and their new APAC brand, Asie Infiny. Claude Blanc, Travel&Co's CEO has a great perspective on how high-end travellers operate.

"Our topline segmentation breaks our clients down into three groups – do it for me, do it myself, do it with me."

In terms of the tribes, Travel&Co's operates at the intersection of Simplicity Searchers and Reward Hunters – people who like to have their holidays arranged for them, but at the very top-end of the market.

"Overall we work on a ROPO model – research online, purchase offline. We have a variety of web sites and a limited presence on social media, but most customers like to talk to our travel experts via the call-centres.

"For Simplicity Searchers we have a range of straightforward upmarket package holidays which can be booked online, but our business is mainly bespoke holidays, customised tours, in the €10,000 per person price range. At this end of the market some people have an idea about what they want having looked at our site and for others what we do is put it together for them.

"We are on social media but not to such an extent that it would make us part of the Social Capital Seekers, but this tribe might be interested in the specialist interest tours we run, giving travellers the chance to educate themselves about a destination. We think these also appeal to some characteristics of the Ethical Travellers.

"But for sure we will have to be more active on social media in the future."

With another eye on the future, the business has recently started to get involved in working holiday visas, appealing not only to the gap year segment but also twenty-somethings interested in a career break.

Blanc concluded: "We think that customers in the future will require mobility and experiential travel. The research around the tribes is relevant as it will make us think more strategically about our future investments and marketing decisions."

CASE STUDY

Claude Blanc
CEO, Travel & Co

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CASE STUDY

Manish Amin
Chief Product Officer, Yatra.com

Manish Amin, Chief Product Officer for Indian online travel agent Yatra.com, identified Simplicity Searchers as one of the tribes relevant to the Indian market.

"International travel is still quite a new experience for most Indian travellers, and we find that for their first few trips overseas people like to travel in groups. They want everything done for them, they like a guide to talk to them in their own language, they like to eat Indian food.

"As they become more experienced, they become more adventurous and might travel independently but for sure, most Indian outbound travellers would be a Simplicity Searcher."

Elsewhere within the Yatra portfolio, business travel is a large part of the business. He identified an interesting breakdown of its corporate clients. "The more senior the traveller, the more likely they are to act like an Obligation Meeter," he suggested. "But there is a trend towards younger, middle-management adding a leisure element to their business trip as a reward.

"So for our business, when the senior Yatra team come to visit Amadeus in Nice, it's very much all about the business. We come in, have the meetings, go home. But when we send our technical developers or younger team members they like to explore the area as much as possible and we encourage them to do that.

"Generally we find that people who work in IT are more likely to want to make the most of their time, rather than people in say more traditional sectors such as banking or manufacturing and there is an element of the Social Capital Seekers here, wanting to share their leisure time with the friends back home.

"There is a great kudos to be had from travelling. Many Indians are keen to get a lot of stamps in their passports and share their experiences online. That's why Europe is so popular because it's easy to see so much in a short period of time."

Many Indians are relatively well off compared with their parents' generation and this is driving a lot of domestic weekend break business, Amin noted. Activities and experiences are particularly popular, creating a nice variation on the Cultural Purists tribe. "A lot of people in their twenties and thirties live and work in the huge cities, but within say a three or four hour drive they can stay at an upmarket eco-resort, or they can go white-water rafting, or they can be trekking in the jungle. These experiential travellers are part Reward Hunter, part Ethical Traveller, part Cultural Purist."

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BUSINESS TRAVEL

The world's economy will look very different in 2030. According to many commentators, China is set to be the world's largest economy and other so-called emerging economies will be mature. India will have the world's largest population. The balance of global power will be shifting east.

The changing patterns of trade will impact how business travel will operate in the future. Video conferencing technology has improved, while never quite living up to its early promise of 3D holographic projections. However, freemium tools such as Skype and Facetime provide cost-effective remote video options which work effectively for the run-of-the-mill meetings.

But for many people, face-to-face real-world meetings will always be a key part of doing business.

How business travel is booked has changed, reflecting the wider shifts in business practices.

Within this, one trend which has emerged over the past few years and which will inevitably gain momentum is more freedom of choice within defined guidelines, as opposed to top down travel policy where one size fits all.

Similarly, as the idea of work-life balance becomes enshrined in law, many businesses are looking to incorporate aspects of the extended leisure stay within a business trip.

Simplicity Searchers

Scenario

Simplicity Searchers want booking their time on the road to be straightforward; the trip itself to be without delays and disruptions; and for any expense claims to be as automated as possible. Employers are in control of only some of these requirements but the Simplicity Searcher travelling on business will expect automation and immediate responses for instances such as flight delay or a substandard room.

Sweetspot

Employers who provide 24/7 support to their travellers, be that by touch, swipe or call, will find that this additional level of reassurance resonates with Simplicity Searchers. Being able to offer content such as ground transfers, automated expense reports, or the ability to self-service while on trip will also remove some of the stresses around a business trip.

Cultural Purists

Scenario

This tribe, although not typically associated with the business traveller, still exists within every organisation. These travellers will be ideal candidates for the shared economy players such as apartment operators, opting for a local independent hotel over a four-star chain property. They will also be receptive to "bleisure" – or open to in-trip services combining leisure with a business trip – by, say, exploring a city once business has been taken care of.

Sweetspot

TMCs should look to provide content which will allow their employees to extend the experience of business travel, be that by destination services or restaurant recommendations. A little bit of culture will go a long way with these travellers.

Social Capital Seekers

Scenario

Work-life balance for this tribe is very important. Travelling for business offers them the chance to enjoy and share their experience to destinations they may not otherwise visit, and access services they habitually may not buy such as lounge access or top city hotels.

Sweetspot

Encourage the self-confident Social Capital Seekers travelling on business to contribute to internal communication channels – such as the intranet, company blog or via user generated content options within the corporate booking platforms as well as engaging with their own channels. Use their desire to share experiences to find out which suppliers are delivering on their corporate commitments and which are falling short.

Reward Hunters

Scenario

A tribe consisting of high earners is likely to include quite a few frequent business travellers, who will expect their business trips to be more indulgent than their leisure trips, but in a different way. They will not expect to travel in economy class or low cost, but they will want to stay in the best hotels and enjoy the experience of being away from the office. Every component of the trip should provide a positive feeling of reward, and any disruptions should be handled quickly and efficiently.

Sweetspot

Demonstrating to these travellers the unusual alternatives which they would not have associated with reward will be key. Using preferred suppliers or revisiting preferred suppliers offering to propose excellent alternatives is a way to retain and attract senior staff. Integrating or providing flexibility in the travel programme such as a rewards mechanism will also be an interesting angle for this type of traveller, for example accepting savings in air which can then be used as a means to upgrade on hotel or destination services via gamification techniques would be attractive for this traveller.

Obligation Meeters

Scenario

Obligation Meeters are, by definition, travelling because they have to rather than because they want to. For these travellers, the trip needs to be functional, hassle-free but also comfortable, both in terms of the actual experience as well as the booking process.

Sweetspot

The employer needs to ensure that all the basic needs required of the trip are met – from ensuring the hotel has Wi-Fi to flight punctuality. Reliability needs to be factored in to preferred supplier negotiations.

Ethical Travellers

Scenario

When travelling on business, some of this tribe's natural instincts will be curtailed, but there are ways for employers and the travel management company to meet their needs. If the company has a robust carbon reporting process in place, it can offset the emissions on the employee's behalf, lessening any concerns the Ethical Traveller has. Likewise the mobile channel and totally paper free travel will be a quick win. Integrating suppliers who have a strong ethical programme in place should also convince Ethical Travellers that their preferences matter.

Sweetspot

Choosing suppliers with strong sustainable credentials is therefore important for businesses where the Ethical Travellers work. In turn, a business with strong corporate social responsibility credentials will find it easier to attract recruits from this tribe.

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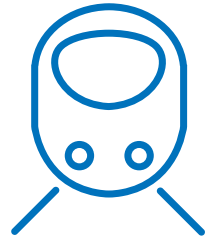
RAIL

Rail travel has been around for hundreds of years and continues to play a significant role in the socio-economic development of humankind. Today, rail continues to attract not only billions of passengers around the world but also staggering levels of public and private sector investment.

In its early history rail drew on the most cutting-edge technology at the time to travel at speeds of up to 30 miles per hour (48 km/h) – truly remarkable in the mid-19th century. At the start of the 21st century, rail continues to innovate, meaning that we now have trains which use the principles of magnetism to travel at speeds of 430 km/h (270 mph).

In fact, the boom in "high-speed" rail has characterised the early years of the 21st century. From China building thousands of kilometres of high-speed rail, to the UK's proposed High Speed 2, to the line linking San Francisco and Los Angeles – high speed rail continues to be a truly global phenomenon.

In Europe, high-speed rail has replaced short-haul flights on many city pairs. The convenience of city centre departure and arrival points, avoiding the hassle of airports and the pleasant on-board experience means that rail has taken market share from airlines.

The simple appeal of train travel is in stark contrast to the complexity required by the rail operators and their IT partners to develop systems to make booking multimodal rail easy for the consumer. A legacy technical infrastructure has, at times, struggled to cope with the demands of the digital world.
But rail operators now realise that efficient and reliable distribution go hand in hand with hi-tech high-speed infrastructure, and some of the most innovative solutions in travel are to be found in the rail sector.

Hundreds of millions of people around the world use rail to get to and from work, for visiting friends and relatives, for days out, and weekends away. All of our tribes will be familiar with the benefits of travelling by rail, but with a different take on what the benefits are.

Scenario

Simplicity Searchers

Simplicity Searchers will take the train when it is more convenient than the other options available. The prospect of avoiding the airport and the restrictions around baggage allowance and liquids in hand luggage will appeal. Rail operators that can make life even simpler by allowing passengers who book in advance the chance to add a hotel to their booking will get greater traction with the tribe.

Cultural Purists

Cultural Purists will be big fans of the rail network, taking great pleasure in joining the locals on their early morning commute or using trains and public transport to navigate cities. The booking at the kiosk window is part of their desire for a spontaneous experience, although some will like to book ahead. Both options need to be available.

Social Capital Seekers

Trains appeal as a mode of travel for all generations, and there is a generation across Europe whose love of international travel began with an Interrail trip in the late teens. Today, Social Capital Seekers with a thirst for travel can update their Facebook profile from a different city, if not country, every day if they are travelling by rail.

Reward Hunters

As their lives are so busy and their time so precious, Reward Hunters are prepared to pay a premium for high speed rail. But when looking for something special, their attention may be focused on trains which can provide a luxury experience, for example moving beyond first class compartments to feature private carriages with fine dining. The glamour of the Orient-Express type rail experience has entered the vernacular and retains an air of romanticism other forms of travel sadly lack.

Obligation Meeters

The major demands of an Obligation Meeter looking to take the train will be ease of booking, closely followed by ticket flexibility if there is an unexpected delay, such as a meeting running over time. Ticket rebooking needs to be automated and done online in real-time rather than manually at the kiosk.

Ethical Travellers

Rail is widely seen as an environmentally friendly, low-carbon way to travel, and as a result it is the Ethical Travellers who are likely to be the biggest advocates among our tribes. They will actively seek out travel destinations that are accessible by rail, reversing the norm by only taking a flight if there is no rail option. But Ethical Travellers are not necessarily on a tight budget and will expect a pleasant on-board experience and a straightforward booking path. The regulatory and technical difficulties with cross-border rail do not concern them – they will expect the booking process to be easy and straightforward.

Sweetspot

Simplicity Searchers

Online and offline travel agents must ensure that they have access to rail content, and that booking international rail is as easy as booking an international flight.

Cultural Purists

Cultural Purists want to use rail in the same way as locals, but operators and distributors will still need to offer advance bookings, seat reservations, ticket change facilities and timetable information in digital channels as well as at the station kiosk or at authorised agents.

Social Capital Seekers

This tribe expects Wi-Fi everywhere, so any rail company looking to appeal to this tribe needs to not only provide it as a free service but also to use its availability in their marketing. Rail companies can then link up with this tribe en route, engaging with them at every stage of the journey while working with partners to suggest places to visit and things to do once they reach their destination.

Reward Hunters

Reward Hunters will appreciate the extravagant experience luxury rail travel can provide. In this case, the transport becomes part of the experience, replacing the first class airline seat and five-star hotels.

Obligation Meeters

Punctuality and reliability are rail basics but resonate particularly for Obligation Meeters. Beyond this basic service proposition, rail firms need to let Obligation Meeters know about the city centre locations, ease of security, the on-board experience – all the things that make rail travel pleasurable as well as functional.

Ethical Travellers

Rail operators can reinforce their relationship with the Ethical Travellers by communicating about the inherent benefits around this mode of travel. It would be important to ensure that all parts of the rail supply chain are sustainable, from catering options to working conditions for staff.

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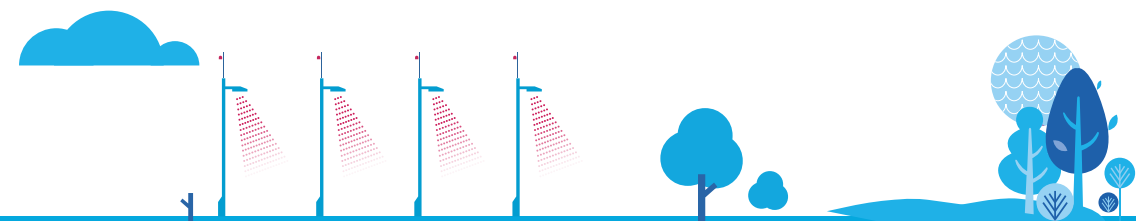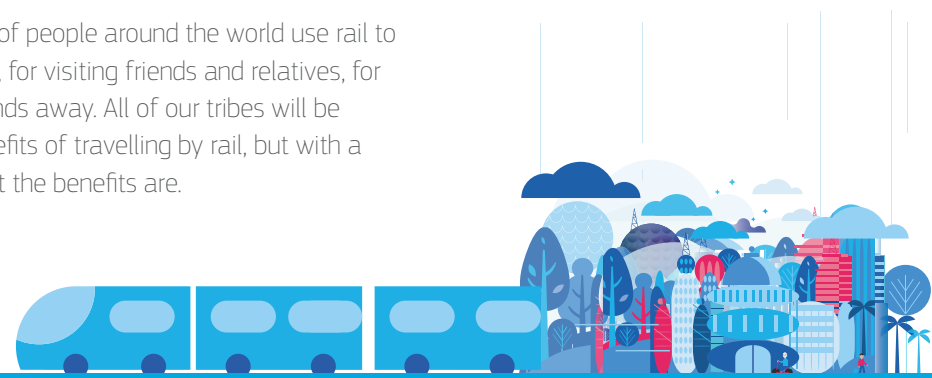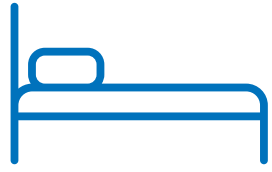
HOTELS

Hoteliers might argue that they have been disrupted to a greater extent than travel agents, and they might have a point. Online hotel bookings are the cash cows for their Nasdaq-listed parent companies – no one has reached a billion-dollar-plus market capitalisation selling air tickets.

Review sites made everyone with an internet connection and a keyboard into a travel critic, and then the review sites became a booking portal.

Some hotels have benefited from this change in the distribution landscape, but it has come at a cost – literally in terms of the commissions payable, metaphorically in terms of losing touch with the customer.

Chances are the arguments about "direct bookings versus OTAs" will continue to rage on the travel conference circuit – but our tribes are not bothered about industry debates. They want the best hotel for their specific needs, at the right price, nothing else.

One of the many hotel trends to have emerged in the past few years is mobile-enabled last-minute booking. Leisure and business travellers are confident that they can arrive somewhere and book a hotel for that night, and specialist apps, global OTAs and even the hotel chains themselves are all offering this service. Like many new hotel sector dynamics, this will only grow over time.

It's not just how hotels are sold that has changed, it is the accommodation market as a whole. The rise of renting private accommodation means that almost anyone can become a hotelier of sorts. Homestays are already a direct challenge to the established hospitality industry on a number of levels and as the idea of staying in someone else's home becomes more mainstream, that challenge will intensify.

One amenity that all tribes will demand is free, reliable high-speed Wi-Fi – be they an Obligation Meeter preparing for a meeting over breakfast or a Reward Hunter checking their investment portfolio before a ninety minute aromatherapy massage. In time hotels without Wi-Fi will be as rare as hotels without mains electricity.

Scenario

Simplicity Searchers

For Simplicity Searchers, the reassurance that a chain hotel gives is ideal and takes away any uncertainty about their stay. Chances are they will have a limited range of preferred brands; it is up to these brands to make sure they are aware of the loyalty shown by the Simplicity Seekers.

Cultural Purists

Cultural Purists are not likely to be big fans of the branded chain property. Priding themselves on the authenticity of the stay, they are prime candidates for private accommodations, believing that staying in someone's home means they are not really a tourist. They can choose a property in an up-and-coming hip neighbourhood rather than Hotel Alley. It puts them at the heart of the action, closer to how real people live their lives.

Social Capital Seekers

Hi-tech hotels are becoming mainstream as technology becomes more embedded in our lives, and Social Capital Seekers are the ideal candidates for these types of properties. How cool would they be, posting pictures of the robot concierge or telling their social network about voice-activated curtains?

Meanwhile, taking bookings via Facebook, Twitter and Instagram gives hotels the chance to deal directly with this tribe, cutting out the costs of the middleman by engaging with this tribe where they are most likely to be found.

Reward Hunters

The luxury hotel sector needs to continually re-invent itself in order to satisfy the needs of these demanding clients. Spa treatments, the view, the size of the in-room TV, even the thread count of the bed linen are components of the hotel experience which Reward Hunters will rate. Attention to detail is a prerequisite in appealing to this tribe.

Obligation Meeters

Obligation Meeters just need somewhere to sleep and shower. Budget hotel chains offer exactly this, but need to make sure that they satisfy these modest requirements.

Another aspect of the hotel stay that is important to Obligation Meeters is the location. Hotels need to have accurate maps on their digital channels, make these maps compatible with a range of devices and operating platforms and have a "directions" function so that Obligation Meeters know exactly how to get to where they need to go and how long it will take.

Ethical Travellers

The trend towards localism also makes renting private accommodation ideal for Ethical Travellers, but there is an opportunity here for hotel chains to position themselves as sustainable. Before booking, this tribe will need to see evidence that the hotel has effective water management, pays its staff a decent wage and uses local suppliers where possible. Corporate responsibility can be an effective marketing tool when targeted at this tribe.
However, this tribe will be quick to point out, and tell the world, of any discrepancies or contradictions in these claims. Hotels need to be confident in their messaging and accurate in their assertions.

Sweetspot

Simplicity Searchers
Simplicity Searchers will expect consistency and ease of check-in and check-out as basic requirements. But a high standard of service delivery will also create an atmosphere of satisfaction for this tribe.

Cultural Purists
Cultural Purists will need to be convinced that hotels are not just for tourists. Location, design, catering and community engagement are elements of the hotel's make-up which can be positioned to appeal to this tribe.

Social Capital Seekers
Social Capital Seekers and hotels can work well together. From rewarding them with an upgrade in exchange for tagged Instagram storyboards to extending discounts to their social network, trendy boutique hotels and 1000-room resort properties alike should think about the best way to capture this on-site marketing opportunity.

Reward Hunters
Hotels that target Reward Hunters need to have business processes in place which ensure that every guest's stay is discretely micro-managed to deliver excellence at every touch point. Social profiling can also be used to help deliver personalised experiences.

Obligation Meeters
Hotels should aim to deliver the highest standard of service for these tribes within their defined parameters with a minimum of having at least free Wi-Fi.

Ethical Travellers
Ethical Travellers will become more demanding – hotels and agents need to make sure they give this tribe detailed information about a property's sustainable credentials. Requests to re-use towels and turn off the lights are no longer even a bare minimum.

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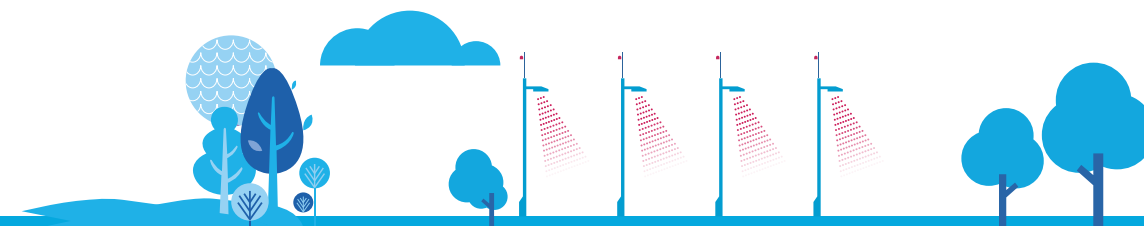
CASE STUDY

Christine Lawson

Senior Vice President, Sales and Catering, Kimpton Hotels & Restaurants

Kimpton Hotels has been a boutique hotel brand since the first Kimpton opened in San Francisco in 1981. At the end of 2014, it became part of the IHG brand in a $420 million acquisition and currently has more than 60 hotels across the US. 2015 marked the company's strongest year to date with a record number of new properties signed.
Christine Lawson explained that Kimpton does not formally segment its customer base, beyond the topline breakdown of business, leisure, group and meeting attendee.
"Our foundational principle as a brand is to offer a warm and welcoming, personalised experience, which we believe is a universal requirement, whatever demographic or psychographic group our guest belongs to."

But within this brand proposition, she said that the concept of the tribes informs the "texture" of its individual relationship with each customer. "We think in terms of emotional touchpoints rather than customer journey touchpoints," she said.

Social Capital Seekers is one tribe "we are very interested in and who are interested in us. We are very much engaged with social, mainly because it helps us to see the guest experience literally through the lens of the guest," noting that the brand pays close attention to the specific visuals that are shared by guests on Instagram and Pinterest. Kimpton was one of the first hotel companies to help guests earn additional loyalty recognition by engaging with social media. "But our loyalty scheme is not about the points, it's about helping us get to know the guests better so we can deliver the best experience."
And the personal touch applies to Obligation Meeters as well. "Clearly, we get a lot of people staying with us on business, but we still need to react to these Obligation Meeters appropriately. We train our property teams to gauge the energy, so if a guest arrives late after a delayed flight our staff can recognise this and respond accordingly."

Interestingly, Lawson added that characteristics of Cultural Purist travellers could be applied to the Kimpton brand. "We've been providing authentic, locally-shaped experiences ever since the company was founded. It's about the design of the rooms, the art on the walls. We want to curate the local feeling so that when our guests leave the hotel they feel as if they've had a truly local experience, not something from the tourist map."
Kimpton also nods towards the Ethical Travellers in its brand ethos, with the company's focus on its sustainability credentials, from optimising energy use across the hotels to using locally-sourced foods in its restaurants and catering operations.

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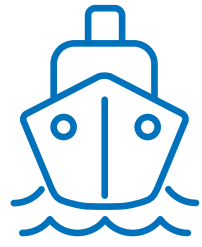
CRUISE

The cruise industry has been one of the fastest growing verticals over the past decade, driven in part by the launch of brand new cruise ships featuring on-board amenities which would not be out of place in a five-star hotel.

Cruise lines have invested heavily in marketing to try to change the perception that cruising is purely the domain of the mature traveller. And with the major cruise lines having a range of brands and price-points, each of the tribes will be able to find something of interest.

Simplicity Searchers

Scenario

Simplicity Searchers will see cruising as a repositioned package holiday, staying on a ship rather than a hotel.

Sweetspot

A cruise is also relatively easy to budget for, with meals and entertainment usually included in the price, so cruise lines and agents should include this in their marketing campaigns.

Cultural Purists

Scenario

Cultural Purists are a difficult sell, although the cruise industry would argue that some of the specialty, lecture-based lines can resonate with the Cultural Purists' desire to use travel as a means of educating themselves.

Sweetspot

River cruise lines might be able to position their self-improvement tours to Cultural Purists. And as the cruise industry continues to innovate, niche brands offering adventure and experiential cruises could appeal to this tribe.

Social Capital Seekers

Scenario

Social Capital Seekers will relish the chance to post social media updates from a different city every other day. River cruises can also satisfy this need for a Facebook-friendly itinerary.

Sweetspot

Cruise lines whose itineraries feature lots of port calls can appeal to this sector, but first the industry needs to ensure that on-board Wi-Fi is affordable and reliable, especially when at sea.

Reward Hunters

Scenario

Reward Hunters are unlikely to be interested in the 5000-berth mega ships, but there are a number of small, luxury cruise lines which provide a luxury boutique hotel experience. The high staff-to-passenger ratios that these lines pride themselves on gives Reward Hunters the level of service and attention they desire.

Sweetspot

Cruise lines can offer some truly unique experiences, from Alaska to Patagonia. Reward Hunters will expect the excursions on offer to be as memorable as the service on board.

Obligation Meeters

Scenario

Cruise ships are increasingly used for meetings, conferences and events, giving the cruise line access to a tribe it would not normally attract. Service and experience on board count, even if the ship is being hired out as a venue.

Sweetspot

Cruise lines which host meetings and events should work with the organisers on follow-up marketing campaigns.

Ethical Travellers

Scenario

Concerns over environmental issues and workers' rights would deter many Ethical Travellers from taking a cruise, so the cruise industry should engage more on these issues.

Sweetspot

To address these concerns, cruise lines should be more vocal in their marketing about their sustainability initiatives.

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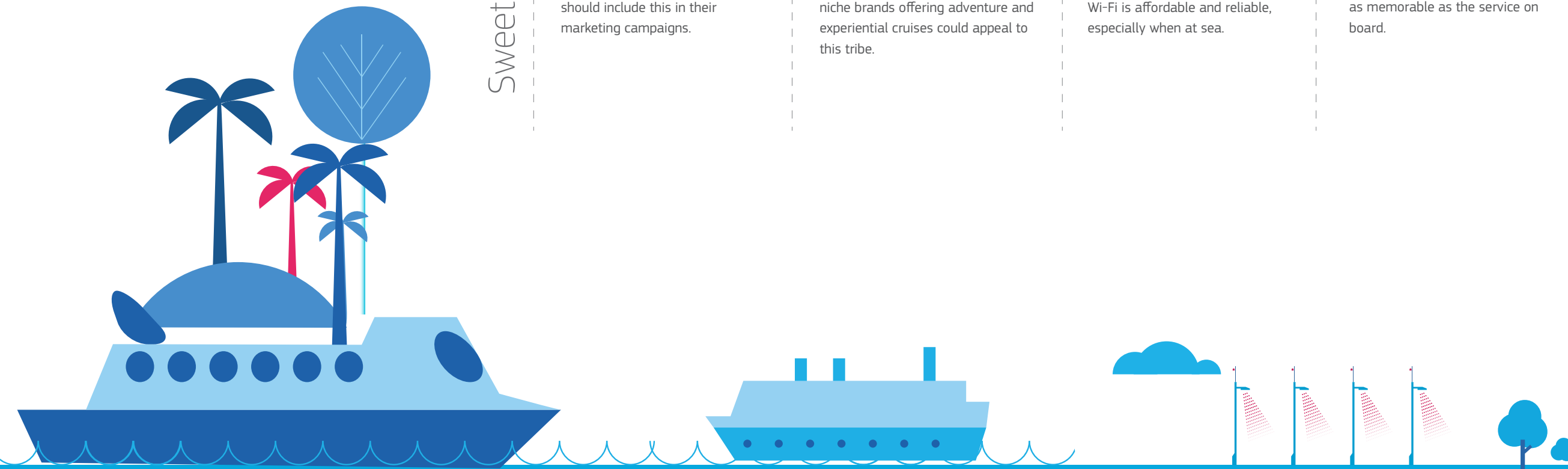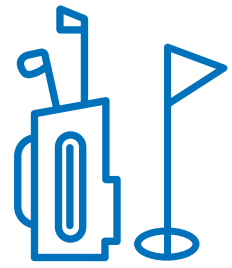
TOURS & ACTIVITIES

Tours and activities is an industry phrase which the traveller thinks of in terms of what you do on holiday. It is now very much a mainstream part of travel, as evidenced by a recent series of major merger & acquisition (M&A) activity.

Simplicity Searchers

Cultural Purists

Social Capital Seekers

Reward Hunters

Obligation Meeters

Ethical Travellers

Scenario

Simplicity Searchers welcome having their tours and activities pre-arranged. New travellers from emerging markets tend to prefer group travel for initial trips, but with time they will become more confident, travel independently and book the tours and activities specific to their interests rather than that of the collective.

Cultural Purists might try to do things independently, but the emergence of platforms which connect travellers with locals offers the best of both worlds. The main bucket-list attractions will be less in demand than the niche and the obscure.

Social Capital Seekers will seek out the unusual and the photogenic to share among their network. In the interests of self-improvement they will be interested in educational and informative trips from art history tours to skiing lessons.

This tribe often just wants to relax, but within this tribe there are some people who are adrenalin-driven. Activities for this group will need to be challenging and unusual while still maintaining an element of luxury and indulgence.

Even on the shortest trip, most Obligation Meeters would like to have some time to see the sights or try something new. Providers of tours and activities need to market to this very specific group in a specific way.

Many tourist boards in large cities work with charitable organisations, offering visitors the chance to do some good while on vacation. This can vary from volunteering for a day to volunteering for six months.

Sweetspot

For the Simplicity Searcher tourist in a city for the first time, natural language options are important and screens, signage and audio tours must reflect this.

Tourist boards and destination-marketing organisations can encourage this tribe to visit by highlighting attractions and events which are not widely known about through personalised communication.

Online galleries are a great way for tour operators to highlight their product and all clients should be encouraged to post images and reviews online.

Reward Hunters will expect to be treated specially, so tours could be private views at museums to behind-the-scenes access to Michelin-starred restaurants.

Timed entrances to museums and galleries might work for this tribe whose time is likely to be constrained.

Tourist boards which are able to identify Ethical Travellers before they arrive can highlight their ethically-based tours and activity products in advance.

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The idea of the traveller tribes resonates across the entire industry and, as shown in this paper, can be applied to different niche segments. One emerging sector is medical tourism. Cassandra Italia is the co-founder of TopDocs, a start-up based in Bangkok, which arranges not only the surgical procedures in association with leading hospitals around the globe but also the travel arrangements for the trip.

It is in an international business where distinct patterns exist. The reason for wanting surgery is important – elective and semi-elective are the industry terms where the former is not related to a serious medical condition, such as a facelift, while the latter is specifically health relate such as hip replacements or dental work.

Within this headline breakdown, the idea of tribes applies. "People from the Middle East enjoy coming to the US for procedures, and will bring their family with them, which puts them into the category of Reward Hunters." she said. "They demand the best possible medical treatment but also the most appropriate surroundings for their recuperation."

There is also a trend towards younger women and men undergoing cosmetic surgery, again as part of a trip which does not require the same level of recuperation as semi-elective procedures but which is seen as a reward.

At the other end of the scale, there are people for whom the procedure is an important health consideration and these can be seen as Obligation Meeters. "If I need a hip replacement but there is a long waiting list or the costs locally are prohibitive, then going overseas to get this done is not about rewards; it's about necessity."

But the overall characteristics of the Simplicity Searchers are a key motivator for TopDocs. "Whatever your income bracket, location, or need for the trip, you need to have reassurance that the hospital has the highest standards and that the travel is appropriate," she said. "We vet all our medical and travel suppliers to give clients reassurance in a market which can be quite daunting and where there is not global regulation.

"The Simplicity Searcher desire to have everything arranged sits precisely with what we are aiming for."

CASE STUDY

Cassandra Italia
Co-founder and CEO,
Top Docs

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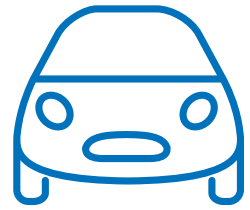
CARS & TRANSFERS

The so-called sharing economy's impact on the hotel sector via the Airbnbs of this world has already been touched on; the sharing-economy's other poster-child is the car and taxi sector. Uber has made booking a taxi direct from an app into a billion-dollar business, and kick-started a revolution in how people book cabs.

Another sharing economy based innovation is car-sharing or ride-pooling. Again, technology is the enabler, allowing travellers to link up with people with room in their car heading in the same direction.

Scenario

Simplicity Searchers

Uber and its peers have made ordering a cab and paying for it via a smartphone as easy as hailing a cab in the street. The simplicity inherent in using these apps will appeal to this tribe.

Cultural Purists

Cultural Purists will argue that sharing economy transportation services recycle income back into the local economy. Taxi apps are creating jobs while car-pooling and ride-sharing gives them the chance to meet locals or other likeminded travellers.

Social Capital Seekers

This tribe is predisposed to use apps and their phone for booking a cab, so they are likely to be part of the sharing economy already. Meeting new people via car-sharing will bring new contacts into their social network.

Reward Hunters

Many of the established taxi app businesses have on-demand limousine services which will appeal to the Reward Hunters. This product range will have great appeal within the city environment and will appeal to this tribe's desire for luxury at every turn.

Obligation Meeters

Quite often getting around a city is more fraught than getting a flight. Obligation Meeters need to know that taxi apps are part of transport options and that a ride is only a few taps away. Uber and its peers are starting to work with TMCs, so employers should factor this in to any conversations about supply partners.

Ethical Travellers

Using car-pooling or ride-sharing for longer journeys is becoming popular with many types of travellers but particularly with the Ethical Travellers.

Sweetspot

Simplicity Searchers
Concierge desks and visitor advice centres can encourage Simplicity Searchers to take advantage of these services by helping them to access and download the apps which are relevant to the local market.

Cultural Purists
Taxi app firms should try to get Cultural Purists to download the app before they arrive at the destination so that the traveller can start using the app immediately.

Social Capital Seekers
Car-sharing brands know that this tribe is active on social media. Targeted advertising on social platforms is an ideal way for them to connect drivers with travellers.

Reward Hunters
Upmarket and boutique hoteliers could form partnerships with limousine providers to ensure that the Reward Hunter always has access to a luxury vehicle.

Obligation Meeters
This tribe will appreciate the ease of use of Uber, Cabify, and other similar services, and if there is a corporate relationship in place, expense claims will be easier as well.

Ethical Travellers
Ride-sharing providers need to find a way to make their product front-of-mind when Ethical Travellers are searching for internal trips. The Ethical Traveller might balk at traditional car hire but sharing a long journey would be less of an environmental concern. Reward Hunters on the other hand would have no interest in this sharing approach, but are a target market for a more upmarket, limo-on-demand type service. Obligation Meeters and Simplicity Seekers will use these services if they are made.

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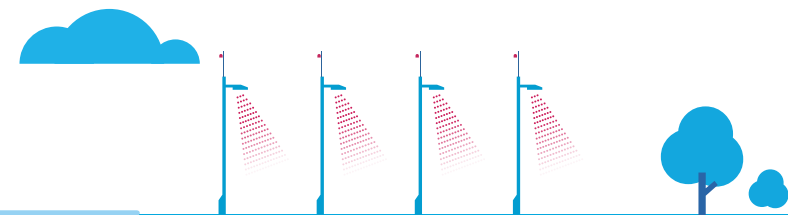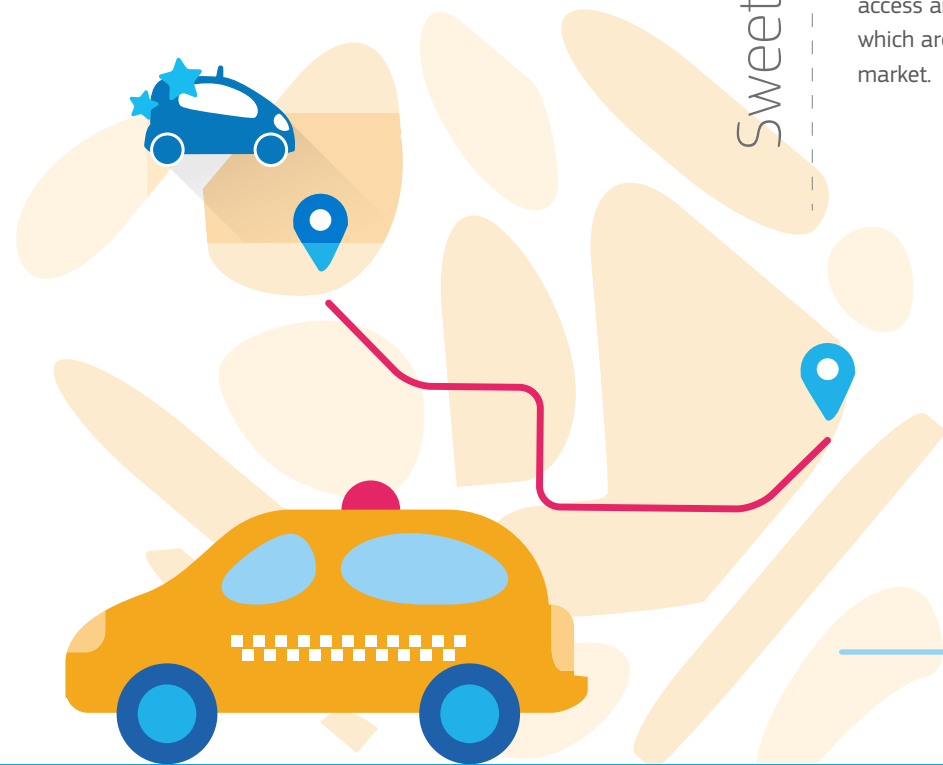
FINAL THOUGHTS

Whilst experts from different areas of the industry shared differing views on which of the traveller tribes were most significant for their own business, one common thread shone through: it doesn't matter if you operate a hotel chain, run a travel agency or manage an airport – all players are striving to segment travellers in order to provide a more compelling experience and to drive additional revenue.

Similarly, technology is playing an integral role in this evolution. Whether it's data analytics of customer behaviour via mobile interaction, as is the norm at ClearTrip, or advanced check-in capabilities designed to cater to Obligation Meeters - the role of intelligence, automation and integration will all be critical to deliver on the industry's objective to better understand and serve the traveller.

Kimpton Hotels provided an interesting example of re-thinking how providers might seek to understand each customer's journey. Emotional touch points, not just customer journey touch points, is a refreshing take on merchandising at different moments. What also seems clear is the opportunity for different providers and sellers of travel to partner and collaborate across different siloes within the industry – affording travel brands the chance to meet the needs of different tribes more fully and at more touch points during the journey. After all, from the traveller's perspective, it's often the overall trip that counts most.

Despite the psychographic nature of the tribes (purposely moving beyond classic socio-economic and geographic segmentation) we can also see that there are local variances in the prevalence of each – for example, Yatra's experience dealing with large numbers of Simplicity Searchers in India. This demonstrates a need for travel brands to view the traveller tribes as a complementary framework during their quest to build an evermore nuanced understanding of the traveller.

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Cassandra Italia
Co-founder and CEO, Top Docs

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