ANTICIPATING TOMORROW’S TOURIST

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IDENTIFY AND TRACK CONSUMER TRENDS

APPLY TRENDS TO A RANGE OF SECTORS AND AUDIENCES

MONITOR RESPONSE OF THE MARKETPLACE

SCIENCE MEETS CREATIVITY
Travel and tourism in numbers
An overview of 2014

- 9% of global GDP
- 1/11 jobs
- US$ 1.5 trillion in exports
- 6% of world's exports
- 30% of services exports
Travel and tourism in numbers:
A story of rapid and continuous growth in international arrivals

1950: 25 m
2014: 1.1 Bn
2030 (e): 1.8 Bn
What I’m NOT going to talk about

[but is still important!]
Changing consumer needs

[What I AM going to talk about]
Pre-Planning

Maximising

The Death of Risk & Personalised Travel

LONGER-TERM

Surprise Me! Immerse Me

NOW/SHORT-TERM
Maximising and The Death of Risk

% who compare / look up prices for any product or service at least once a week
GLOBAL AVERAGE 46%

“when I plan a trip abroad, I find out as much as I can about the destination before I go”
GLOBAL AVERAGE 74%
Want to book the best trip?

Let experts do the searching for the best trip. We guarantee the lowest prices.

I want to book a: [Fight] [Hotel] [Package]

endless discovery. easy decisions.
WayBlazer is transforming the way travelers seek advice.

Voyando
Travel experts

Wayblazer
Travel insights
Appetite for surprise

% who are very or quite interested in “A service that suggested one new place to visit in my nearby area each week, which I would not normally consider “ [UK, 2015]
50% of 25-34 yr olds who have used a VR (virtual reality) headset e.g. Oculus Rift, Samsung Gear done already, or are interested in doing so in the future [UK, 2015]
Periscope/Meerkat
Could drive a growth in livestream tourism
NOW/SHORT-TERM

Peer Power & Connected Communities

+1

LONGER-TERM

5* Customers

Review Culture
NOW: CONSUMERS RATING BRANDS

62%

Read a review online posted by other consumers about a product/service at least once a month

NEXT: BRANDS RATING CONSUMERS

45%

Would be happy if a company whose services they have used rates them as a customer...
I take extra care to be a nicer person – both when hosting Airbnbers and when travelling myself, and in Ubers I tend to talk more to the drivers than I did with normal taxi drivers. **Uber and Airbnb** have humanised the taxi and the hotel industry and that can only be a good thing.

*Sandy, Swedish Trendspotter*
Hotel Tropica

40 Reviews | #221 of 234 Hotels in San Francisco
663 Valencia Street, San Francisco, CA 94110

Traveller rating

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very good</th>
<th>Average</th>
<th>Poor</th>
<th>Terrible</th>
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</thead>
<tbody>
<tr>
<td>2</td>
<td>9</td>
<td>3</td>
<td>8</td>
<td>18</td>
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</table>

Rating summary

<table>
<thead>
<tr>
<th>Location</th>
<th>Sleep Quality</th>
<th>Rooms</th>
<th>Service</th>
<th>Value</th>
<th>Cleanliness</th>
</tr>
</thead>
<tbody>
<tr>
<td>★★★★☆</td>
<td>★★★★★</td>
<td>★★★★☆</td>
<td>★★★★☆</td>
<td>★★★★☆</td>
<td>★★★★☆</td>
</tr>
</tbody>
</table>

Private Room with TWO Double Beds.
San Francisco, CA, United States ★★★★☆ (28)

28 Reviews ★★★★☆

Accuracy ★★★★★
Communication ★★★★★
Cleanliness ★★★★★
Location ★★★★★
Check In ★★★★★
Value ★★★★★
Art Series Hotel Group are turning the tables and reviewing their guests. Get five stars and you’ll win a free night to come and stay again. But be warned, if you misbehave everyone will know.

Available at Art Series Hotels from April 17 to May 31. Sleepover from $185 per night.

artserieshotels.com.au/reversereviews
1800 278 468
Connected Travel

- NOW/SHORT-TERM
  - Smart Boredom
  - Performative Perfection
  - Digital Detox

- LONGER-TERM
  - Casual Connectivity
  - Augmented Reality
Our demand for constant connection is growing

- **65%** of 16-24 check personal emails in bed at night [41% check work emails]

- **30%** of 16-24 check personal emails in bed at night [41% check work emails]

- **40%** of 12-15 year olds who agree that "When I am on holiday, I post photos of my holiday onto a social networking site"

- **30%** of 12-15 year olds who agree that "When I am on holiday, I post photos of my holiday onto a social networking site"
EE Wi-fi at Glastonbury

NTT Docomo Mount Fuji Wi-fi
"I like it when people acknowledge my posts/photos/comments on social networking sites"
“Sometimes I feel the need to get away from phone calls, emails and text messages and switch off”
Do wearables point to a new relationship with technology?

Those who have used wearable tech: 42%

Those who are interested in using wearable tech in the future: 14%

[Averaged across 25 global markets]
Supershoes
smrtGRiPS
from Boreal Bikes
Augmented Reality in Tourism
Leisure Upgrade

Authenticity
Dark Tourism

Changing Holiday Experiences
MY BAYEUX TAPESTRY STORY
WILL TECHNOLOGY CHANGE TRAVEL?
66% who “feel the need to learn more” [Global Avg]

65% “When I go on holiday, the most important thing for me is to experience the authentic culture of a place” [Global Avg]

71% “Entertainment should be about learning new things as much as having fun” [UK]

58% “I am interested in visiting sites associated with historical tragedies whilst on holiday” [UK]
Buddy up with a local
withlocals.com

Eat with a local
eatwith.com
4% of 16-24 yr old smartphone owners who use “Augmented reality apps [where your phone overlays information on images of the real world e.g. Layar, RealityBrowser] at least once a month”
Automation

22%

Would generally prefer to use self service technologies at the airport instead of being served by an assistant/worker

Human touch

43%

Are interested in “an online shop assistant that I could talk to for advice as I was browsing products online

30% HAVE USED LIVE CHAT
Relish the flavors of our award-winning lower Manhattan restaurant
The hotel’s restaurant, 2West, is a modern American bistro featuring expertly and simply prepared dishes that offer exceptional dining in lower Manhattan. The
Omena Hotels, Finland
Service “free of physical human interface”

The Henn-na Hotel, Japan
Staffed by humanoid robots
A.L.O. Botlr
the robotic bellhop

Ray the robot valet parker
Düsseldorf Airport
Royal Caribbean’s Bionic Bar

Casa Modrano drone champagne delivery
SNCF, Copenhagen Airport, Virgin Atlantic experimenting with Google Glass
Biometrics: Mood [as well as ID]

72% of US 16-24 year olds who would be interested in a service that was able to create a playlist based on mood.

Intel teams up with 50 Cent to launch BioSport heart-beat monitoring earphones.
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