



Travel Tomorrow

Appendix

Table of contents:

What you will find in this appendix

The appendix contains the following elements:

Chapter 1: Macro analysis	3
Chapter 2: Trend analysis	50
Chapter 3: Customer insights	96
Chapter 4: Case studies on disruption	104
Chapter 5: Workshop impressions	108
Chapter 6: Planning	112



Appendix:
Table of content

Macro analysis

Trend analysis

Customer insights

Case studies on disruption

Workshop impressions

Planning



Table of contents

1. Demographical

2. Economical

3. Social

4. Technological

5. Ecological

6. Political & Legal

Summary

KEY DEMOGRAPHICAL FACTORS FOR FUTURE TRAVEL

- The **global population is estimated to grow to 8,1 billion in 2025**, while Gross Domestic Product is increasing rapidly in the developing economies.
- The **population in The Netherlands is expected to increase with 2% towards 17.5 million in 2025**.
- The **age segment of 65-80 in The Netherlands is estimated to represent 17% of the total population in 2025**, increasing the amount of people who have time for travel.
- After years of recession, the **total amount of travel trips will show a moderate growth again** between 2014 and 2018, while growth is expected to further increase after 2018.
- **79% of outbound trips from The Netherlands is leisure related** and 21% is business related.
- **Travelling by car and airplane remain the most popular modes of transportation in 2018**, although a small shift is expected to occur in favor of air travel.

Implications for Dutch travel industry (1/2)



Offer total travel solutions for the aging Dutch population

The age segment of 65-80 will show the largest growth in the next decade. As this segment has time and money for travel, it becomes an increasingly attractive target group for travel companies. Engage this segment by offering them a total travel package, as this generation of people values peace of mind, trust, and transparency, as well as having everything 'arranged properly'.



Differentiate brands and offerings in the saturated travel market

Although the amount of outbound trips is expected to show positive growth again due to economic recovery, the Dutch travel market will remain to be highly saturated with intensive competition. As such, differentiation of brands, products and services will be key in capturing future market share.



Offer more flexibility and independence in travel transportation

Train and flight transportation providers should try to incorporate the benefits of car travel (e.g. flexibility, independence) into their own offered mode of transportation in order to attract more travelers. For example, start thinking of the possibilities of 'demand-driven flights'.

Implications for Dutch travel industry (2/2)

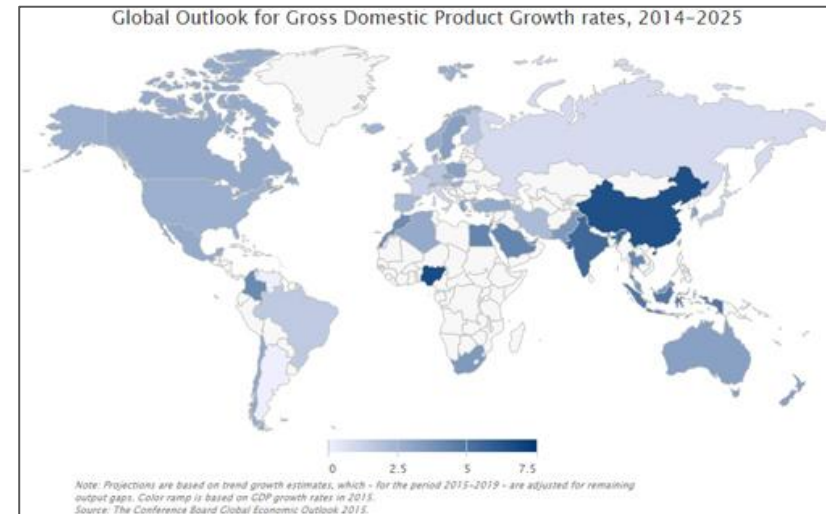
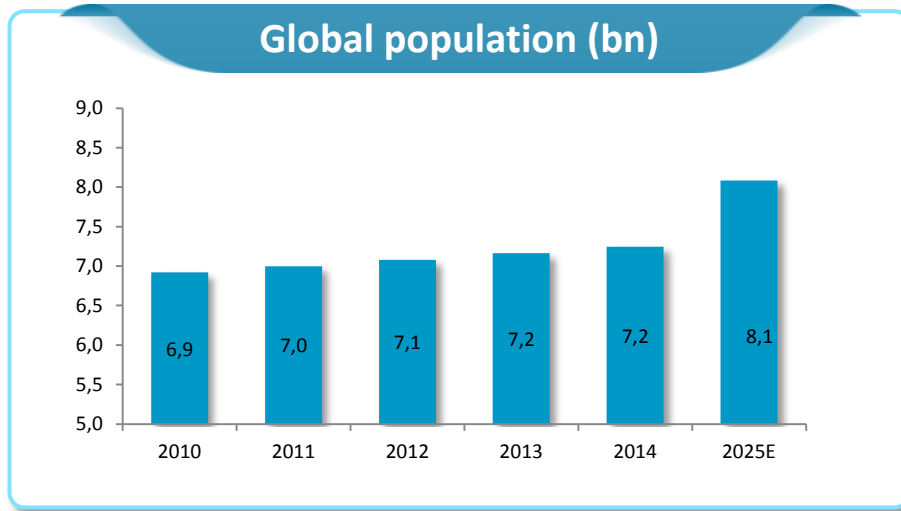


Seize global opportunities

As the global population is quickly rising in numbers and wealth, the 'global customer' becomes a new target group for travel companies with an international market perspective. The Dutch travel industry should consider to broaden its horizon and take advantage of this massive growth opportunity.

The global population is estimated to grow to 8,1 billion in 2025, while Gross Domestic Product is increasing rapidly in the developing economies

Global population growth



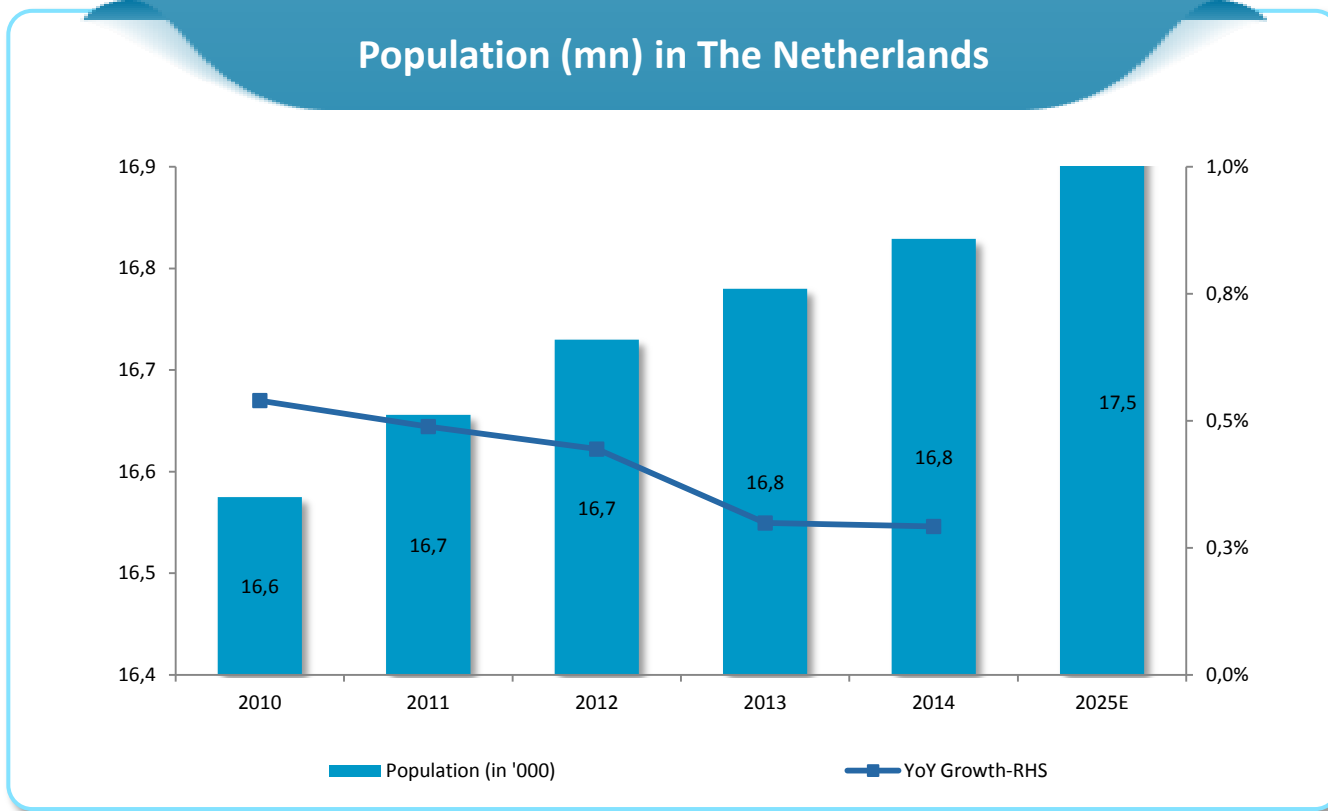
A heavy growth in global travel is expected due to increasing wealth of the global population

Source: United Nations / Conference Board Global Economic Outlook 2015



The population in The Netherlands is expected to increase with 2% towards 17.5 million in 2025

Population growth in The Netherlands



Growth until 2015:

- The Dutch population has grown at a CAGR of 0.4% between 2009-2014.
- Total population of The Netherlands was 16.8mn in 2014.

Future estimation:

- The growth momentum of the population is expected to be below 1% in the coming decade.
- The Dutch population is expected to grow at a slower rate and will be 17.5mn in 2025.

Year on year growth will moderately decrease in the next 10 years

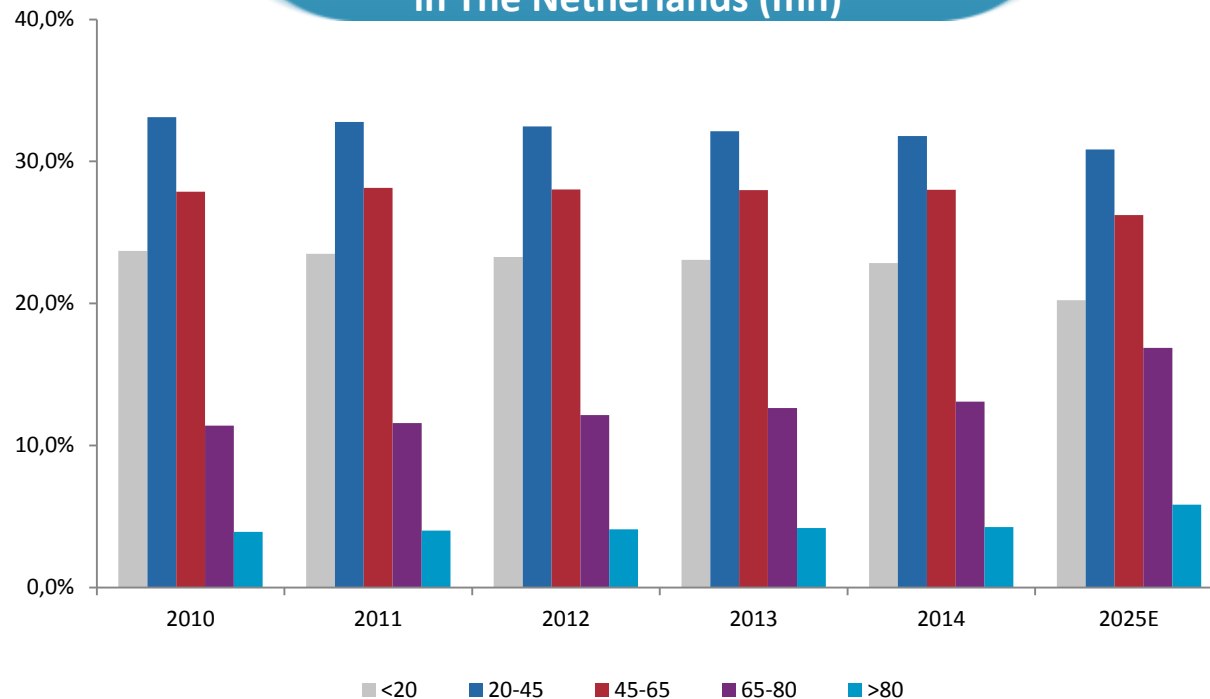
Source: Euro monitor, World Travel & Tourism Council, NIPO, CBS



The age segment of 65-80 in The Netherlands is estimated to represent 17% of the total population in 2025, increasing the amount of people who have time for travel

Aging population of The Netherlands

Age distribution of population in The Netherlands (mn)



Growth until 2015:

- The population is ageing with number of people in the age group above 45 increasing each year.
- Currently 45% of the population is in the age group above 45 years.

Future estimation:

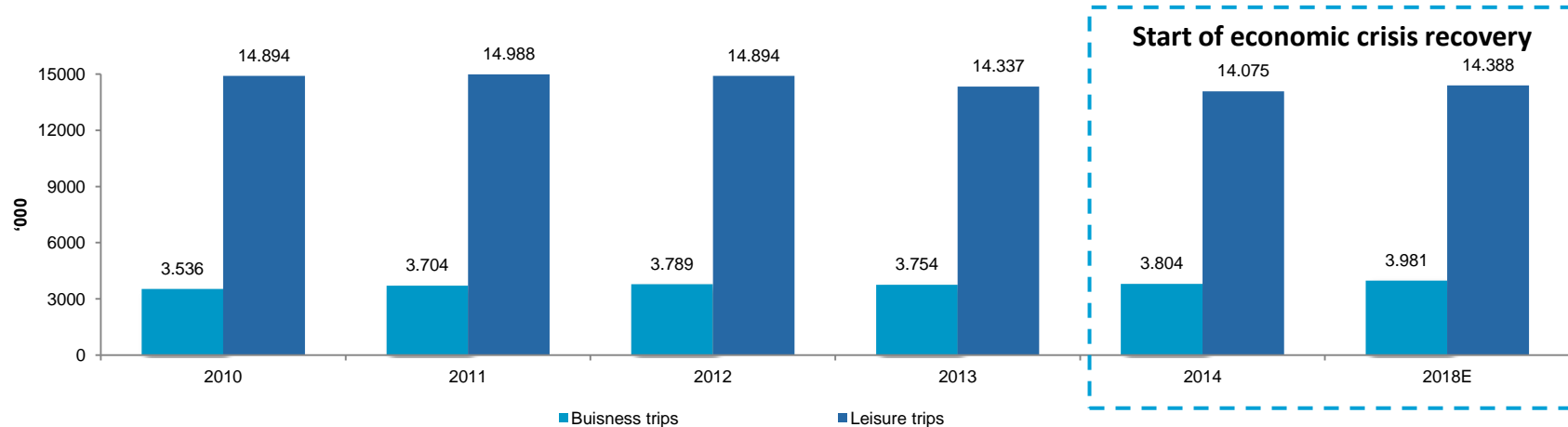
- The trend of the ageing population will continue with population above 45 years estimated to constitute 49% of the total population by 2025.
- The population above 65 years will increase by 32%.

The 65-80 age segment is expected to show the largest grow rate in the next decade

After years of recession, the total amount of travel trips will show a marginal growth again between 2014 and 2018, while growth is expected to further increase after 2018

Travel trips in The Netherlands

Business versus leisure trips



Business

- Business travel comprises 21% of the total trips made in 2013. This will remain equal in 2018.
- The total amount of business trips was 3.7mn in 2013 and is estimated to be 3.9mn in 2018.

Leisure

- Leisure travel comprises 79% of the total trips made in 2013. This will remain equal in 2018.
- The total amount of leisure trips was 14.3mn in 2013 and will grow to 14.4mn in 2018.

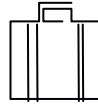
79% of outbound trips from The Netherlands is leisure related and 21% is business related

Travelling by car and airplane remain the most popular modes of transportation in 2018, although a small shift is expected to occur in favor of air travel

Preferred transportation modes in The Netherlands

Outbound travel in 2013

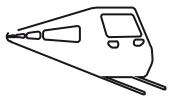
- 18 Million outbound trips:



- 9.3 million by car



- 6.9 million via air travel



- 1.8 million via other ways of transportation

Outbound travel estimation for 2018

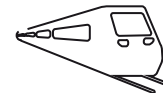
- 18.3 Million outbound trips:



- 8.6 million by car



- 7.5 million via air travel



- 2.1 million via other ways of transport

Table of contents

1. Demographical

2. Economical

3. Social

4. Technological

5. Ecological

6. Political & Legal

Summary (1/2)

KEY ECONOMICAL FACTORS FOR FUTURE TRAVEL

- After years of recession, **the Dutch economy is expected to recover**, showing a moderately positive effect on the number of travelers, travel frequency and travel spend in 2020.
- **The leisure segment spends substantially more money on travel** than the business segment and this difference is expected to become even more apparent in 2018.
- The majority of Dutch **outbound travel expenditure is accommodation and food related**.
- Most Dutch people purchase short trips in the period between May and October, and **purchase long trips in the period between November and April**.
- Despite internationalization and the appeal of other continents for authentic travel experiences, the **highest travel spending still occurs in Western-European countries**.
- Dutch travelers show **different spending behavior across continents** with a clear preference for total package deals in Africa and 'accommodation only' in Europe.

Summary (2/2)

KEY ECONOMICAL FACTORS FOR FUTURE TRAVEL

- In the next decade, **online spend will continue to increase** in favor of offline spend for Dutch retail in general.
- The travel industry has one of the highest online market shares of all retail categories and **online spend in travel is expected to show a further increase of 23% in 2020.**

Implications for Dutch travel industry (1/2)



Provide data-driven, personalized offerings to increase share of wallet

The average spend per trip of leisure travelers will show a positive increase in the future. Companies should provide personalized offerings that are based on a deep understanding of customer behavior to increase the share of wallet of leisure travelers. Data-driven insights will help them to achieve this.



Promote seasonal offerings at the right time of the year

Companies should tailor their offerings in line with seasonal customer desires. As most customers tend to book their summer holidays in the period November – April, this is a good time to stress total package deals. Instead, during the period May – October, companies should promote city trips and last-minute deals.



Extend business models by providing additional travel services

The biggest travel spending categories are accommodation and food related. As such, travel companies should consider to broaden their current portfolio by selling additional travel services outside of their core business or extend their service model by starting new partnerships.

Implications for Dutch travel industry (2/2)



Tailor offerings and value added services to geographical locations

Travelers tend to show different spending behavior across continents, which should be taken into account when making offerings and providing value added services. For example, in the US, many travelers tend to go on a road trip and are interested in complimentary car rental services and insurance.

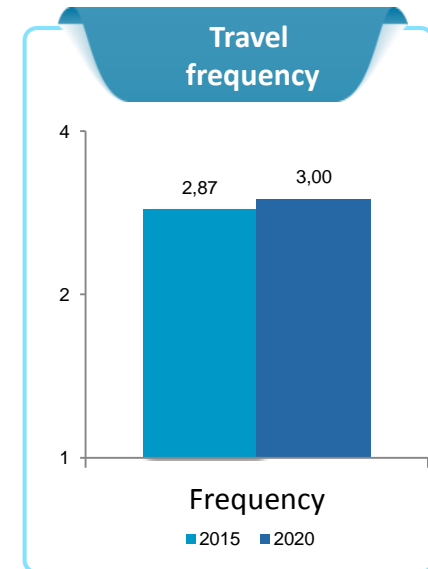
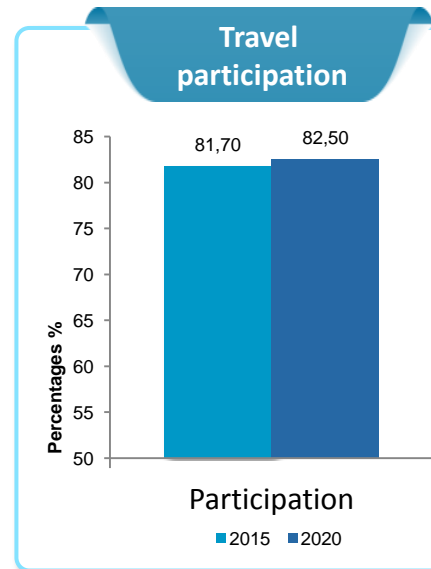
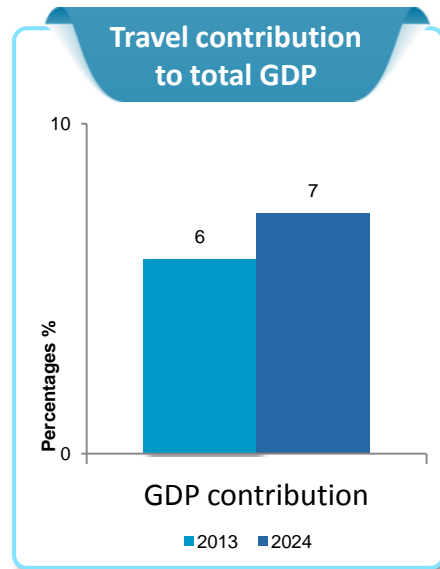


Embrace digital transformation

The vast majority of travel bookings are purchased online, while online spend is expected to even further increase by 2020. As such, it is essential for travel companies to offer a compelling digital customer experience with efficient underlying digital operations. Both should be based on a business model that intelligently makes use of the increasing importance of digital.

After years of recession, the Dutch economy is expected to recover, showing a moderately positive effect on the number of travelers and travel frequency in 2020

Growth of leisure travel industry in The Netherlands*



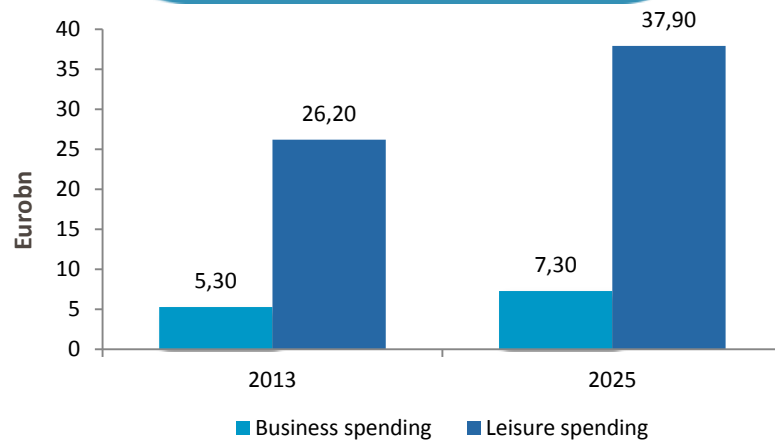
- The travel industry contributed 5.9% of total GDP in 2013. The industry's contribution to total GDP is expected to further increase to 7.3% in 2024.
- A marginal growth is expected in the amount of Dutch people who participate in travel related activities.
- A marginal growth is also expected in the frequency of travel among the Dutch population.

The growth of the travel industry is expected to further increase after 2020

The leisure segment spends substantially more money on travel than the business segment and this difference is expected to become even more apparent in 2018

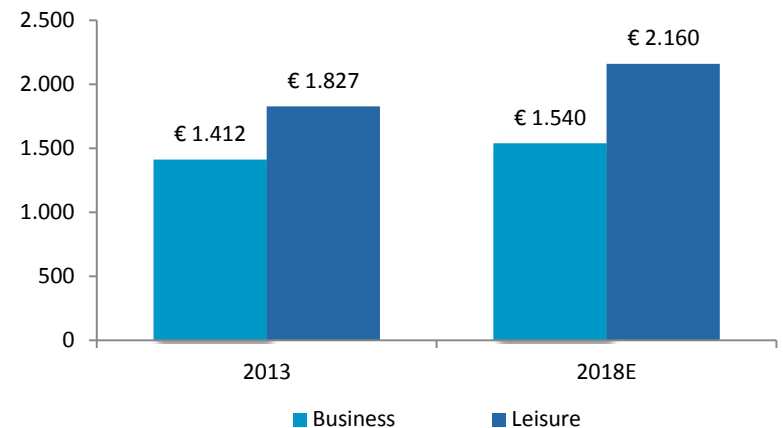
Leisure versus business spend in The Netherlands

Travel spend per segment



- Leisure spending by Dutch travelers is estimated to increase to EUR37.9bn in 2025, posting a 3.8% CAGR (2013-2025)
- Business spending by Dutch travelers is estimated to increase to EUR7.3bn, posting a 3.3% CAGR (2013-2025)

Average segment spend per trip



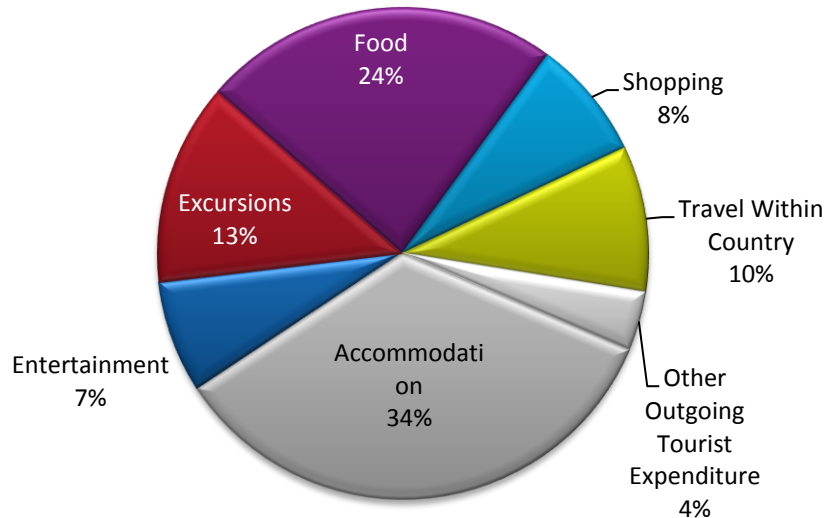
- Average leisure spending by Dutch travelers is estimated to show a 18% growth (2013-2018)
- Average business spending by Dutch travelers is estimated to show a 9% growth (2013-2018)

The average spend per trip is noticeably higher for leisure travel in comparison to business travel

The majority of Dutch outbound travel expenditure is accommodation and food related

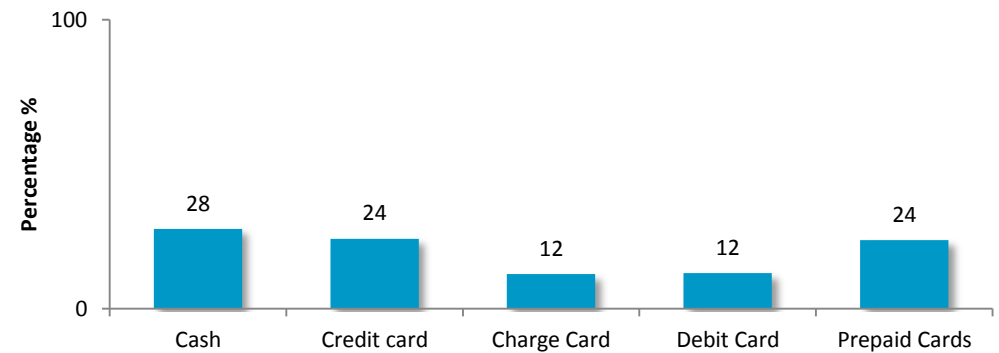
Travel expenditure & payment methods

Outbound tourist expenditure by category, 2013



100% = EUR14.6bn

Preferred method of payment 2013

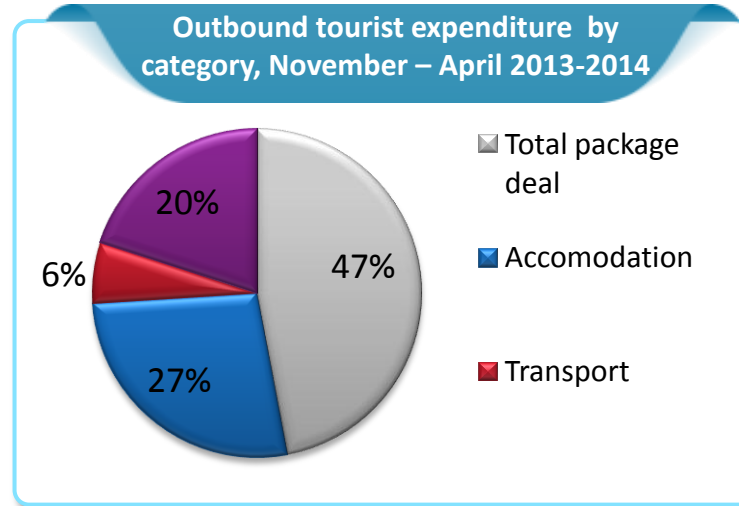
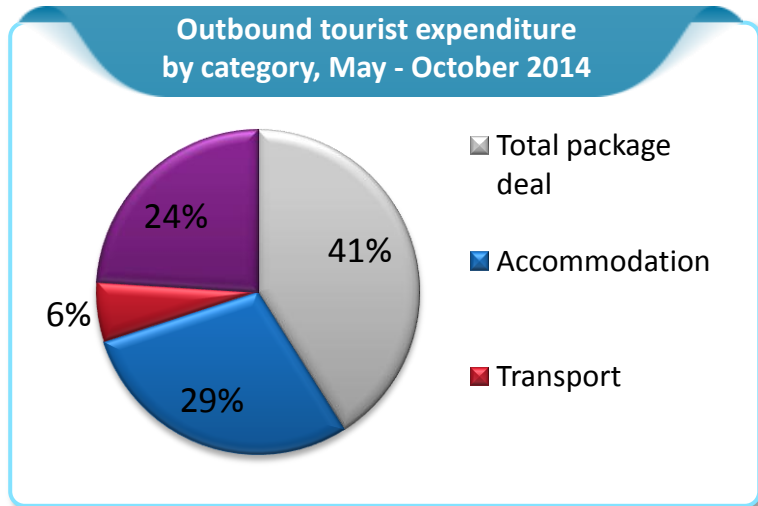
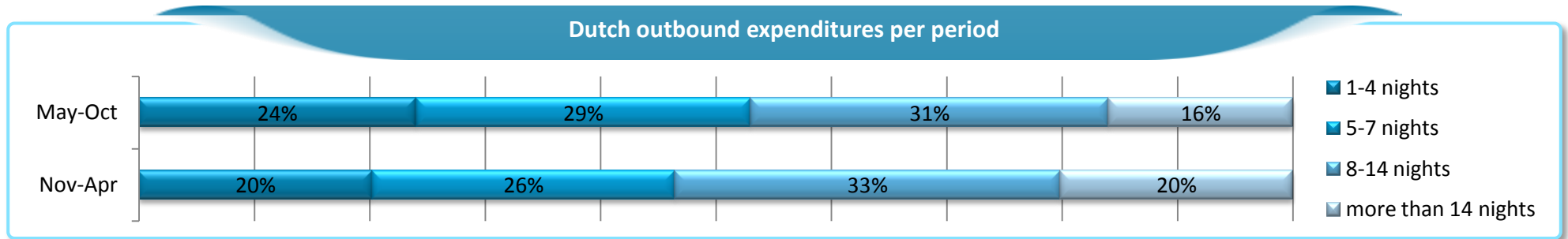


- Most money is spent on accommodations, food and excursion related offerings.
- Cash and (prepaid) credit cards are the most popular payment methods.

Travel companies should consider to extend their portfolio to capture a higher amount of travel spend

Most Dutch people purchase short trips in the period between May and October, and purchase long trips in the period between November and April

Short versus long trip spend per period*



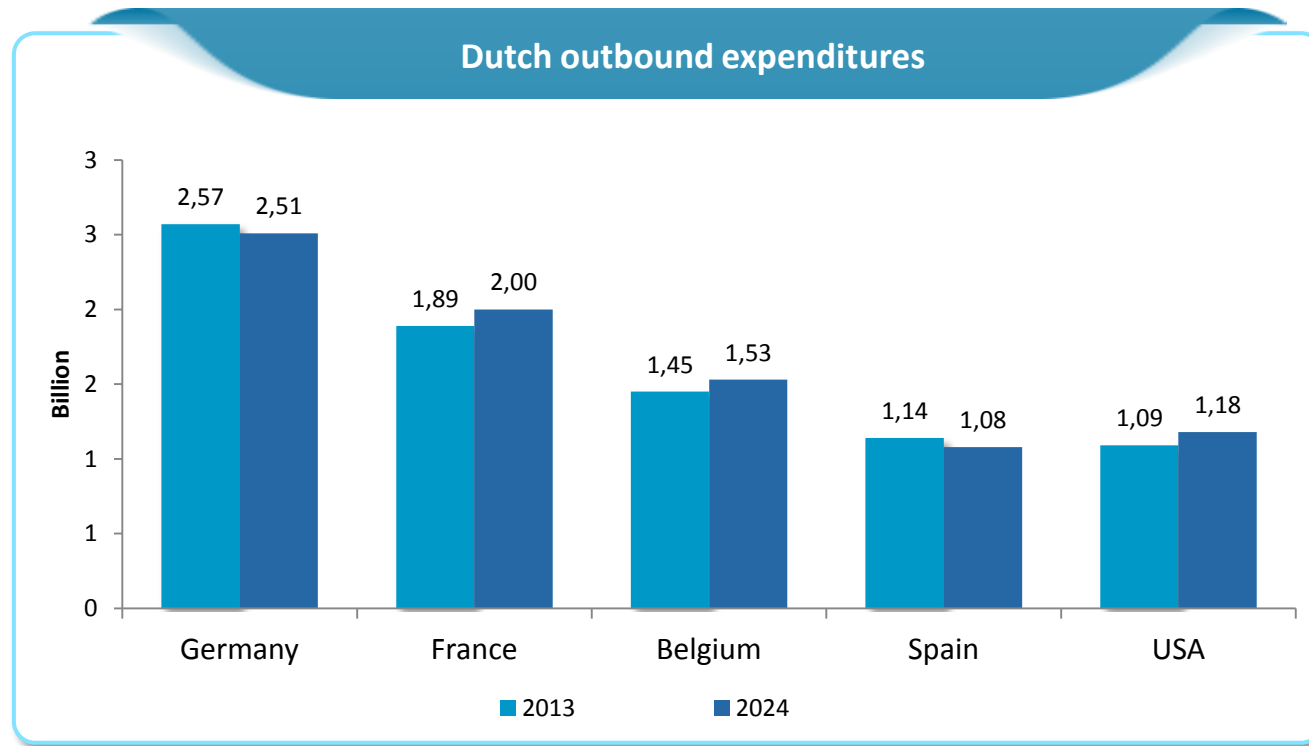
- More money is spent on booking separate accommodation and transport in the period between May and October.
- Dutch travelers spend more money on total package deals in the period between November and April.

Most Dutch people seem to book their annual, longer vacation during autumn and winter time, whereas they book a more spontaneous city trip during spring and summer time

*This data excludes business travel

Despite internationalization and the appeal of other continents for authentic travel experiences, the highest travel spending still occurs in Western-European countries

Geographic spend of Dutch population



- The highest Dutch travel spend occurs in Germany, France and Belgium, consisting of both end-destination and transit travel.
- Outside Europe, the USA is the most popular country in terms of travel spend.

Most Dutch people still spend their money in surrounding countries, making these countries interesting to include in travel offerings

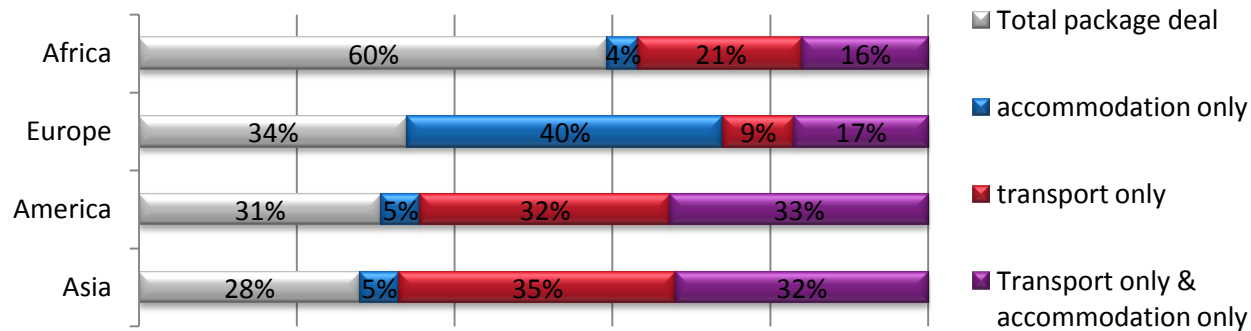
Source: Euro monitor, GFK



Dutch travelers show different spending behavior across continents with a clear preference for total package deals in Africa and 'accommodation only' in Europe

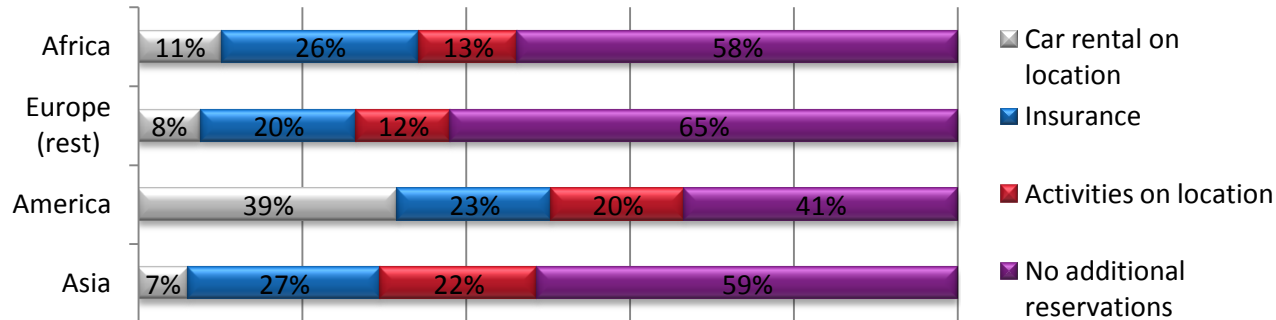
Expenditure and additional reservations per continent

Dutch outbound expenditures abroad per continent (2012)



- Total package deals are most popular in Africa.
- 'Accommodation only' is most popular in Europe.
- 'Transport only' is most popular in America and Asia.

Additional reservations on outbound travel per continent (2012)

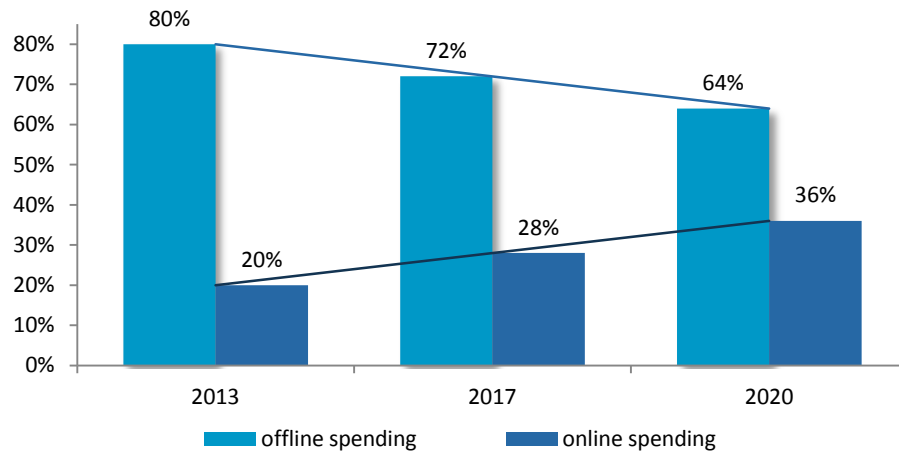


- Car rental reservations are most popular among Dutch people who visit America.
- On all other continents insurances are most popular.

In the next decade, online spend will continue to increase in favor of offline spend for Dutch retail in general

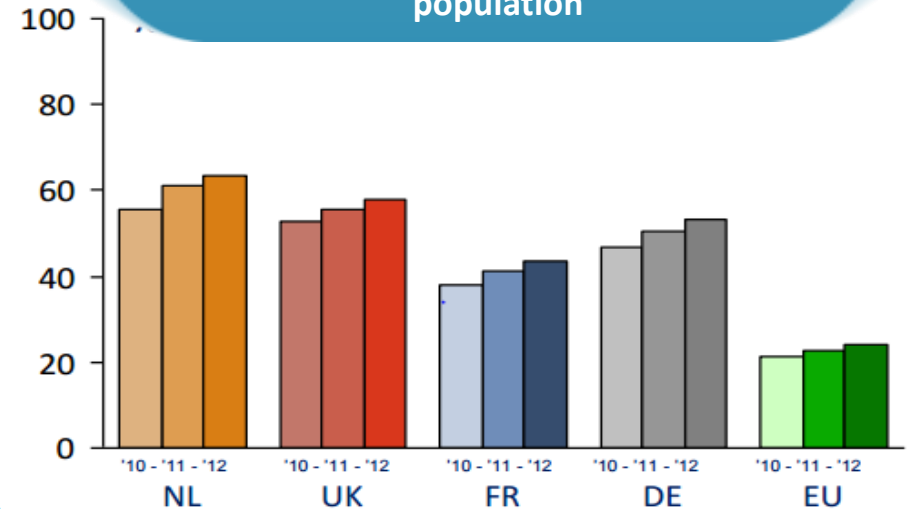
Online spend in Dutch retail

Offline versus online expenditure in NL



- It is estimated that consumer spending will increase from 2013 to 2020 with +12% to €73.6 Bn, off which offline expenditure will decrease with 15% and online expenditure will increase with 145%
- Offline expenditure will decrease with €5,4 billion between 2013 and 2020, Whereas online expenditure increased with €14.3 billion

Percentage of online shoppers among total population



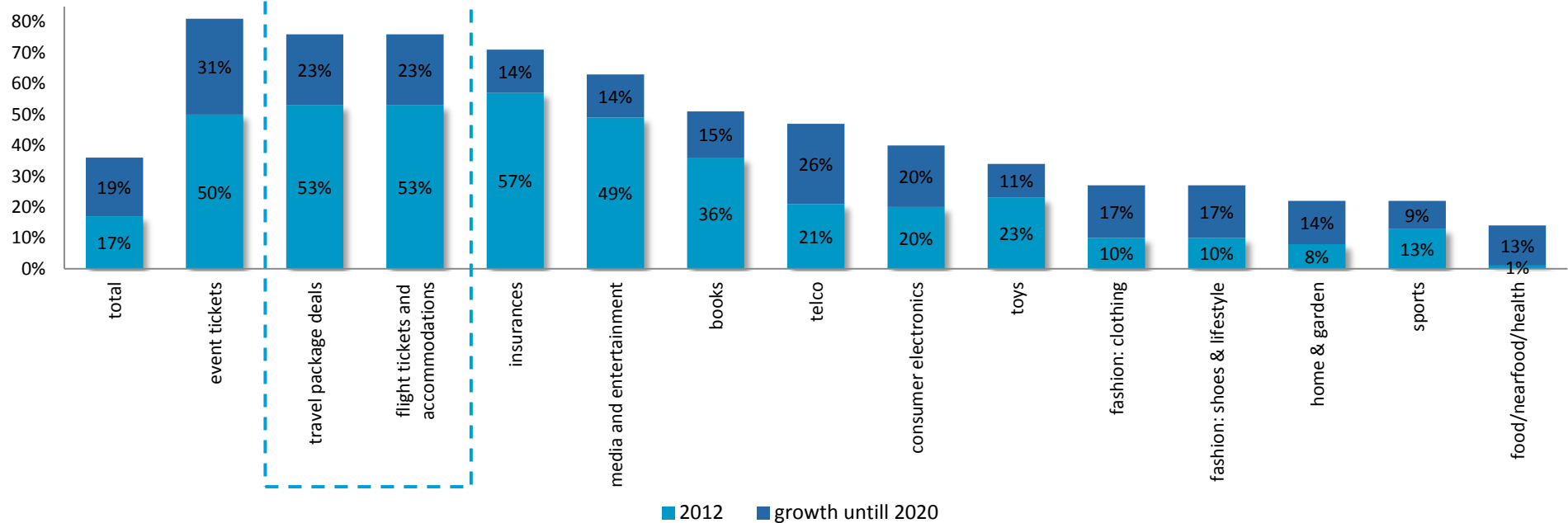
- Percentage of online shoppers in Netherlands as part of total population is higher than the EU average and leading e-Commerce countries
- In 2013, 83 percent of internet users between age 12 to 74 reported that they have shopped online

The percentage of online shoppers in The Netherlands is relatively high compared to other countries

The travel industry has one of the highest online market shares of all retail categories and online spend in travel is expected to show a further increase of 23% in 2020

Online growth and market share across categories

Online market share of retail categories in The Netherlands



Incorporating “digital” into daily operations will be essential to capture future market share

Source: How the Dutch shop 2020



Table of contents

1. Demographical

2. Economical

3. Social

4. Technological

5. Ecological

6. Political & Legal

Summary

KEY SOCIAL FACTORS FOR FUTURE TRAVEL

- In the leisure segment, **short hotel visits and city trips are becoming increasingly popular** among the Dutch population in 2020.
- Travelers no longer rely on professional expert advice when considering different travel options, as **user generated content is increasingly leveraged during travel orientation**.
- Digital platforms that enable **crowd sourcing and peer-to-peer collaboration** are expected to conquer an even an bigger part of the future travel market.

Implications for Dutch travel industry



Be part of a digital platform with relevant offerings for short trips

The Dutch population will travel more frequently, but the length of the trips will be shorter. Companies need to be part of a digital, self-service platform in order to be top of mind when travelers are orientating for short trips. They often use such platforms when comparing and booking separate tickets for transport and accommodation.



Include peer-to-peer content in professional travel advice

Customers trust the opinion of their peers and are increasingly making use of peer-to-peer content when looking for travel inspiration. Companies need to leverage and build on such content as part of their professional travel advice in order to make a compelling case. The Tripadvisor 'certificates of excellence' are a good example of doing this.

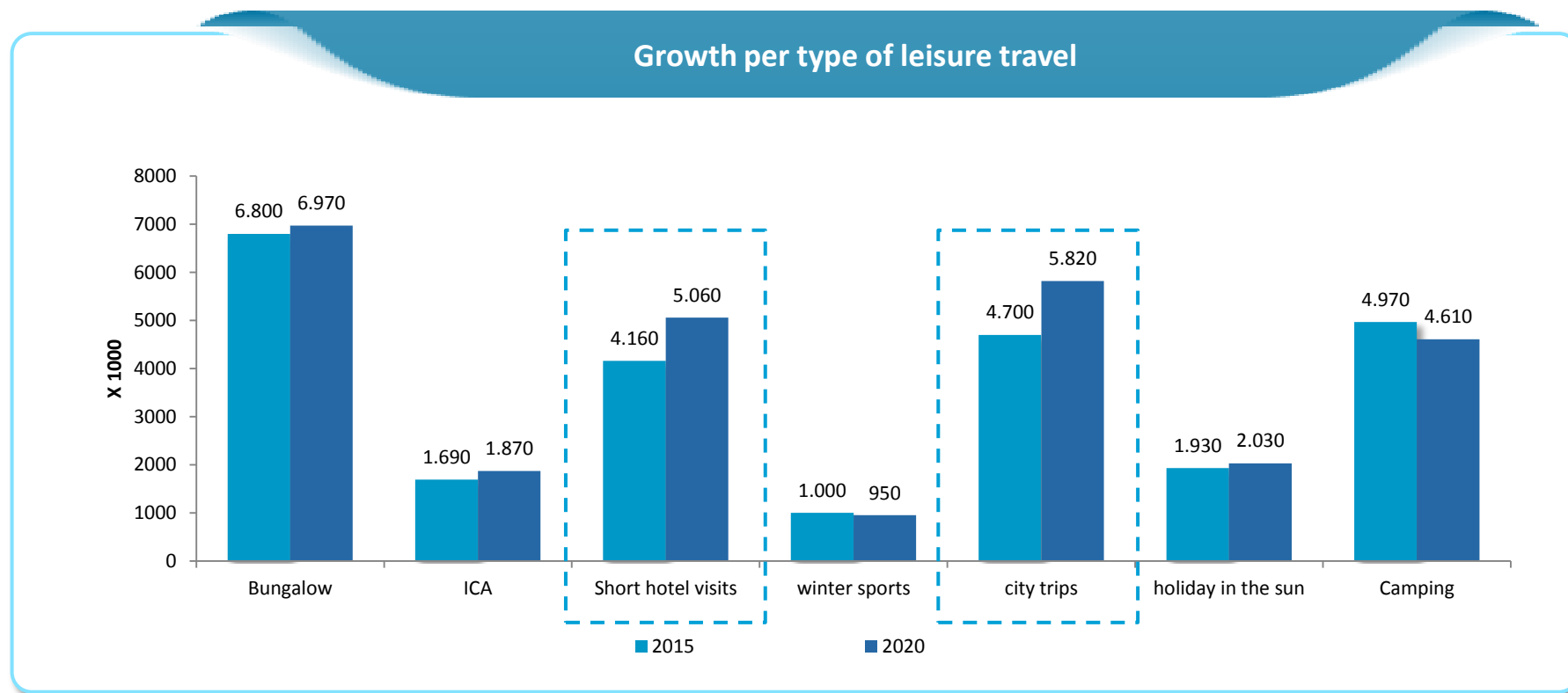


Expect social media and social travel to play a key role in future travel

Social media have build valuable personal profiles of travelers and are expected to play a key role in the future travel industry. Facebook could leverage its knowledge to offer direct leisure travel offerings, while LinkedIn could do the same for business-related travel services. They might also integrate with other digital platforms in order to provide a full-scale travel solution.

In the leisure segment, short hotel visits and city trips are becoming increasingly popular among the Dutch population in 2020

Popularity of leisure travel types*



Camping and winter sports are expected to be less popular in 2020 in comparison to 2015, although a great deal of travelers will continue to make use of these travel types

Travelers no longer rely on professional expert advice when considering different travel options, as user generated content is increasingly leveraged during travel orientation

User generated content

“Social travel will become an increasingly formalized part of the travel industry within five years. Social media tools will be used to aid collaboration between travelers and people on the ground in their destination of choice.”

Daniel Burrus - business advisor & technology futurist



Peer-to-peer reviews and social media are expected to play an even bigger role in future travel

Digital platforms that enable crowd sourcing and peer-to-peer collaboration are expected to conquer an even an bigger part of the future travel market

Crowd sourcing



Home2Home

“Crowd sourced travel and services are successful, because we trust our friends and family. The voice of the crowd has credibility. It’s an amazing part of the way that we make our decisions and discover new travel possibilities”

Filip Filipov- Director B2B at skyscanner

Travelers will increasingly collaborate on digital platforms to communicate with trusted peers and arrange their travel plans accordingly

Table of contents

1. Demographical

2. Economical

3. Social

4. Technological

5. Ecological

6. Political & Legal

Summary

KEY TECHNOLOGICAL FACTORS FOR FUTURE TRAVEL

- The Dutch population is **increasingly using mobile devices in daily life.**
- Desktop computers, laptops and tablets are currently the most important **travel orientation and booking types**, while traditional travel agency's are decreasing in popularity.
- Nearly 75% of Dutch smartphone users browse the internet every day, and over **70% have used them to make informed shopping decisions.**
- **Mobile commerce is expected to show substantial growth rates** in the future, as an increasing amount of contents and payment methods will be optimized for mobile device usage.
- iDEAL is the **preferred online payment** method in the Netherlands.

Implications for Dutch travel industry



Ensure a seamless experience & be omni-present

As mobile devices are increasingly used for information seeking and making purchasing decisions, customers need to be able to switch channels without any problems. Travel companies should offer them with a seamless experience across all interaction moments. Being omni-present is the solution to satisfy customer needs in an increasingly digital and fragmented world.



Prepare for 100% mobile commerce

Mobile commerce is expected to become more important in the future, as an increasing amount of contents and payment methods will be optimized for mobile device usage. Companies should anticipate on this future scenario and start thinking about ways to 'win over the mobile customer'.

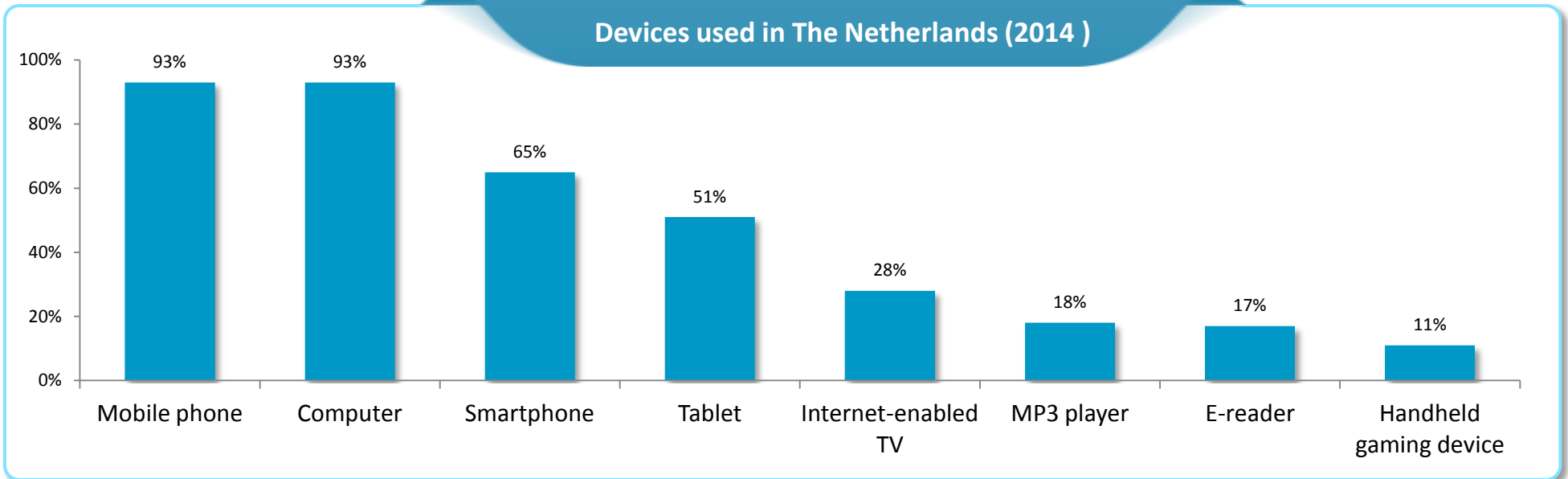


Have a multi-device strategy that ensures responsive design

As customers use different devices to orientate and book travel products, it is essential to ensure that online contents look good on all devices and browsers used. Companies should therefore have a multi device strategy in place that ensures a responsive design.

The Dutch population is increasingly using mobile devices in daily life

Technology adoption in The Netherlands

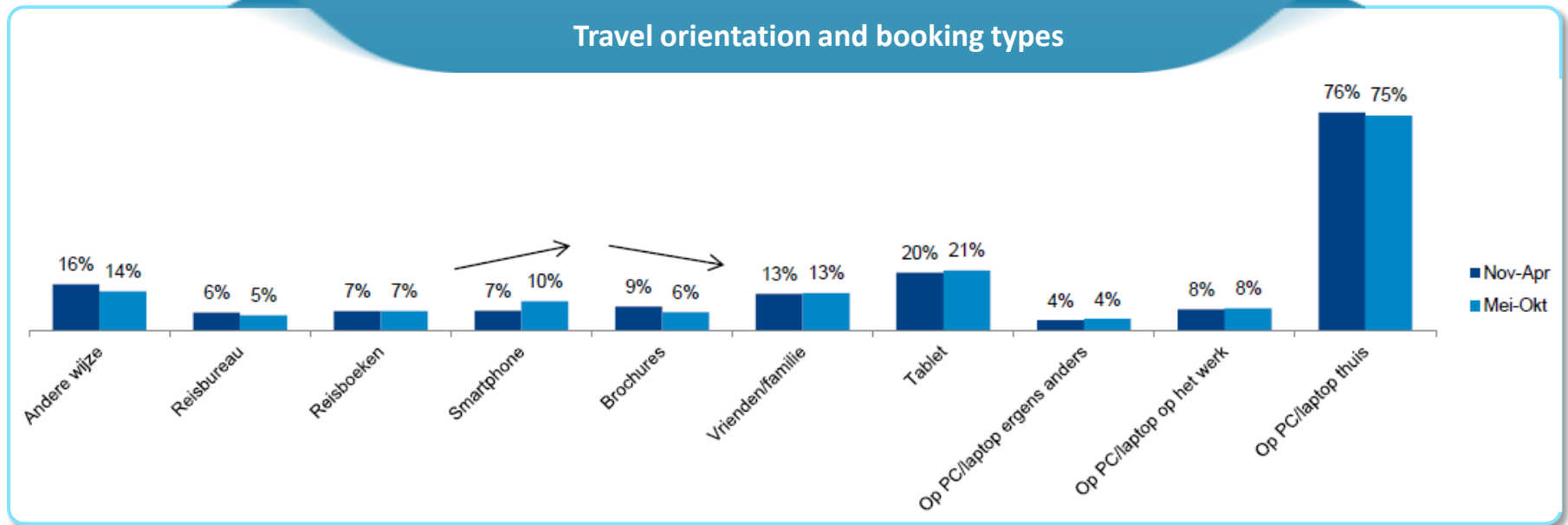


- The share of Smartphones of total mobile phone penetration in The Netherlands has well passed the 50% mark.
- In 2016, it is estimated that there will be approximately 24 million mobile connections in the Netherlands, up from 23 million in 2013.

Smartphone usage is becoming ubiquitous in The Netherlands

Desktop computers, laptops and tablets are currently the most important travel orientation and booking types, while traditional travel agency's are decreasing in popularity

Travel orientation and booking



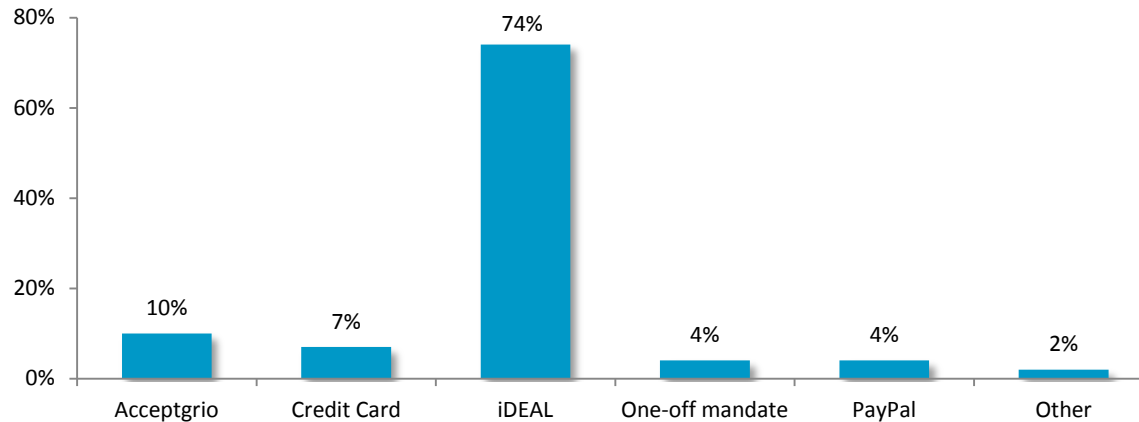
- Dutch people mostly use the desktop computer, laptop and tablet to orientate on travel.
- Nearly 75% of Dutch smartphone users browse the internet every day, and over 70% have used them to make informed shopping decisions.
- Presently, mobile shopping is held back from the lack of widely adopted payment methods that are designed for smaller screens.

Mobile commerce (purchasing through mobile devices) is expected to show substantial growth rates in the future, as an increasing amount of contents and payment methods will be optimized for mobile device usage

iDEAL is the preferred online payment method in the Netherlands

Digital payment methods

Preferred online payment method (2012)



Other growing payment methods



- The number of electronic payments in Netherlands has increased by 8% in 2012 compared to that of 2005.
- iDEAL, a Dutch online payments system, recorded a 21% growth in the number of transactions in 2013.
- As more non e-commerce businesses are also starting to use iDeal, the number of mobile iDeal transactions will increase.
- The number of iDeal transactions is expected to grow with another 20-25% and exceed 172 million payments in 2014.
- Other international digital payment methods are introduced to make mobile payments more convenient.

iDEAL has the potential to further increase the amount of digital payments, but only if it is able to implement a standard for mobile payment

Table of contents

1. Demographical
2. Economical
3. Social
4. Technological
- 5. Ecological**
6. Political & Legal

Summary

KEY ECOLOGICAL FACTORS FOR FUTURE TRAVEL

- The **share of renewable energy** in the total energy consumption in The Netherlands has increased since the early 1990's and is estimated to be 16% in 2020.
- The Dutch population is becoming **increasingly aware of environmental issues**.
- **Social support for sustainable policy measures** is expected to further increase in the next decade.
- **Ongoing climate change** is expected to increasingly affect global weather conditions, impacting the popularity of specific travel destinations during certain seasons.
- Although hard to predict, **natural disasters** will always have an impact on the travel industry.

Implications for Dutch travel industry



Prepare for the age of renewable energy

Traditional resources are still relatively inexpensive, but renewable energies are becoming more mainstream every day. Travel companies should start thinking about including renewable energy into their transportation and accommodation offerings in order to prepare for the future.



Communicate positive contributions to the environment

Society values are shifting in favor of environmental-friendly concepts and travelers are becoming increasingly aware of environmental issues. They will increasingly expect companies to make an effort to reduce their carbon footprint and environmental impact. Companies who make environmental-friendly achievements will strengthen their brands and customer loyalty.

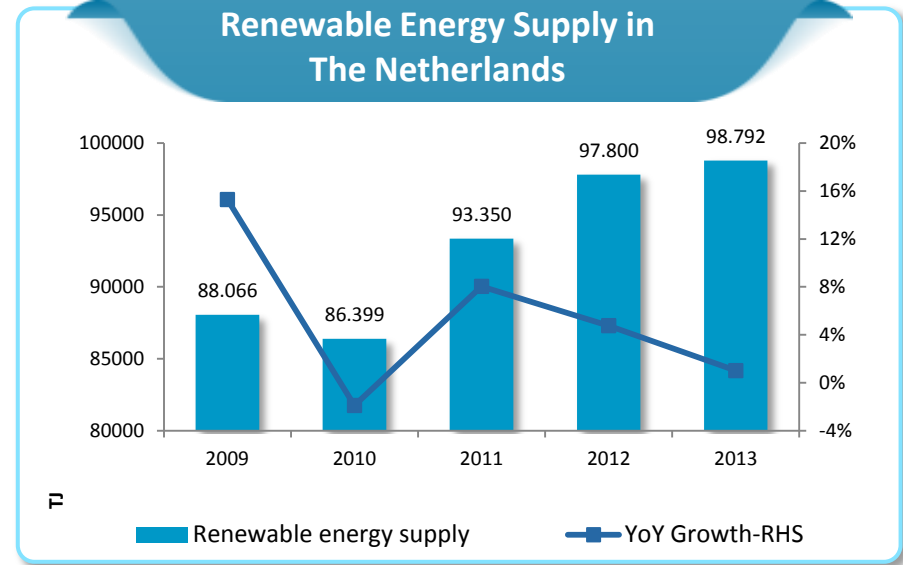
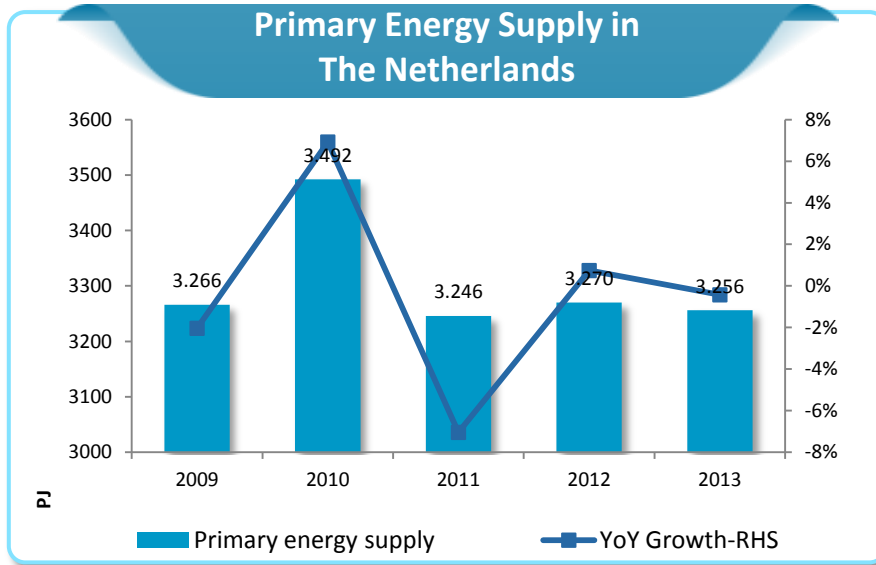


Acknowledge the risk of climate change and natural disasters

Climate change is increasingly impacting global weather conditions and causing more natural disasters. These phenomena affect the popularity of certain travel destinations at specific times. Companies should take this risk into account and apply geographical diversification to their portfolio.

The share of renewable energy in the total energy consumption in The Netherlands has increased since the early 1990's and is estimated to be 16% in 2020

Renewable energy in The Netherlands



- The Netherlands has a leading position in wind energy at sea, biomass processing and greenhouse farming.
- The share of renewable energy in total energy consumption rose from 1% in 1990 to 4.2% in 2012.
- The European Renewable Energy Directive has set the target of 14% renewable energy by 2020.
- To stimulate renewable energy production, the Dutch government has earmarked an annual sum of € 1.4bn from 2015, which represents a major step towards achieving the 2020 target.
- The share of renewable energy in total energy consumption in Netherlands is estimated to be 16% in 2020 (Eurostat)

Source: CBS Netherlands / Eurostat

PJ: petajoule, TJ: terajoule



The Dutch population is increasingly becoming aware of environmental issues

Perception of the environment

Society values

- 66% of the Dutch consumers state: as a society we need to consume a lot less to improve the environment for future generations.
- People are becoming more aware of the need for eco-friendly and healthy lifestyles. As a result, social support is growing for sustainable policy measures, such as reflecting CO2 emissions in pricing.

Eco Friendly travel

- Sustainable transport, accommodation and entertainment is currently being promoted in customer communication.
- Sustainability issues are included in customer satisfaction surveys, or integrated into the questions.
- For 2025, it is expected that customers will be informed on which transport option causes the least environmental burden.

Eco Friendly destinations

- Hotels and other places of accommodation will focus on energy efficiency and will produce their own energy, including solar energy.
- The accommodation suppliers need to be encouraged to use tools such as 'Travelife' for accommodation in order to promote their sustainability performance.
- For 2025, it is expected that customers will be informed on how to make a positive environmental contribution at the destination.

Social support for sustainable policy measures is expected to further increase in the next decade

Ongoing climate change is expected to increasingly affect global weather conditions, impacting the popularity of specific travel destinations during certain seasons

Impact of climate change

Volcano ash continues to disrupt air travel

European airports open as ash cloud disperses but transatlantic passengers face long detours



✎ Air passengers seek information at Munich airport in Germany after flights were grounded yesterday due to volcano ash from Iceland. Photograph: Lukas Barth/AFP/Getty Images

Travellers faced continuing delays today as ash from the Iceland volcano continued to disrupt airline schedules.

Most people heading for European destinations had relatively minor problems despite a few cancellations. But severe disruption continued to hit transatlantic flights as aircraft were forced into long detours around the ash cloud, adding

Hurricane Iselle: Hawaii braced for direct hit

Iselle expected to arrive on the Big Island on Thursday evening, bringing heavy rains, 85mph winds and flooding in some areas



✎ The Big Island's size and terrain should help break up the hurricane, making it only a tropical storm as it passes Maui and Oahu. Photograph: Hugh Gentry/Reuters

Iselle was supposed to weaken as it slowly trudged west across the Pacific. It didn't – and now Hawaii is poised to take its first direct hurricane hit in 22 years.

State officials are assuring the islands are ready and people should prepare but not panic. Tourists wonder whether their flights and activities would be disrupted and tried to get in some last-minute beach time before the surf's up, but ugly. And

Although hard to predict, natural disasters will always have an impact on the travel industry

Table of contents

1. Demographical
2. Economical
3. Social
4. Technological
5. Ecological
- 6. Political & Legal**

Summary

KEY POLITICAL AND LEGAL FACTORS FOR FUTURE TRAVEL

- Some international treaties offer **guidelines on future pollution and CO2 emissions**, although currently there is no binding legislation in place.
- **Companies must comply with new EU privacy regulation**, which increases the data protection of its citizens.
- **Political instability will impact the popularity of specific travel destinations**, as regional conflicts are ongoing and unlikely to be solved in the near future.

Implications for Dutch travel industry



Start thinking about reducing CO2 emission

Depending on the acceptance of new treaties and legislation, it is expected that the travel industry will have to reduce its CO2 emission in the near future. Companies should already start thinking about ways to incorporate this into their business operations before actual legislation is accepted and a huge transformation will be required.



Comply with new privacy regulation

New EU regulation will increase the responsibility and accountability of organizations concerning the data protection of their customers. Privacy and data protection will increasingly become a 'hot topic' and companies will have to take this topic very seriously in order to prevent future governmental fines. Non-compliance can lead to fines of up to 5% of annual world turnover.



Anticipate on political instability of travel destinations

Political instability will impact future travel, as regional conflicts are unlikely to be solved anytime soon. Companies should make assessments of the political stability of their offered travel destinations and spread their risk based on a geographical diversification of their portfolio.

Some international treaties offer guidelines on future pollution and CO2 emissions, although currently there is no binding legislation in place

Environmental guidelines

Kyoto protocol

- The Netherlands seems to be proceeding slowly in the direction of its Kyoto target.

ACARE goals

- The ACARE goals are formulated by the Advisory Council of the Aeronautics Research in Europe. However, these goals are not obligatory.
- The 2020 goal of ACARE is to have a 50% CO2-reduction per passenger kilometer in comparison to the fleets' average in 2000.

Depending on the acceptance of new treaties and legislation, it is expected that the travel industry will have to reduce its CO2 emission in the near future

Companies must comply with new EU privacy regulation, which increases the data protection of its citizens

Privacy regulation in European Union

Upcoming EU Data Protection Regulation

Individuals:

- Right to be forgotten
- Explicit consent
- Right of data portability
- The right to refer all cases to their home national data protection authority

Organizations:

- EU laws will apply to companies not established in the EU
- Increased responsibility and accountability
- Fines for non-compliance (5% of annual world turn over)
- Unnecessary administrative burdens will be removed
- Notify serious breaches without undue delay
- No more notifications
- A 'one-stop-shop'
- Impact assessments
- Data Protection

Future scenario: contextual privacy

Ideally, privacy practices must respect 5 contexts:

1. Temporal context
2. Spatial context
3. Functional context
4. Identity context
5. Social context

Principles of contextual privacy

Three important practices that organizations should employ:

1. Practice the doctrine of "no surprises."
2. Give consumers choices for participating with your service.
3. Treat more data as "personally identifiable."

In the future, contextual privacy will become an increasingly important topic

Political instability will impact the popularity of specific travel destinations, as regional conflicts are ongoing and unlikely to be solved in the near future

Political instability

Egypt travel advice: is it safe to go?

Egypt is under curfew as it reels from violent clashes in Cairo. What should you do if you have booked a holiday to a Red Sea resort, such as Sharm el-Sheikh?



Sharm el-Sheikh is a popular holiday resort on Egypt's Red Sea. Photograph: Alamy

As [Egypt](#) reels from the worst violence in decades, the nation's vital tourism industry seems certain to suffer. Egyptian security officials are forcefully dispersing sit-ins, resulting in a spiralling toll in deaths and injuries, while the country is under emergency law until further notice. So what to do if you're already booked to holiday there?

The situation in Egypt has been a recent example of political instability that impacted the travel industry

Appendix:
Table of content

Macro analysis

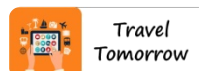
Trend analysis

Customer insights

Case studies on disruption

Workshop impressions

Planning



Overview of main trends for Travel Tomorrow

TREND OVERVIEW



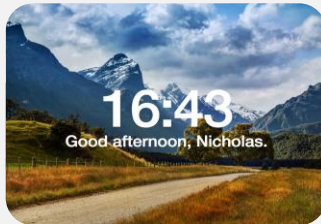
**BUSINESS
ESSENTIALS**



**HUMAN-CENTRIC
TECHNOLOGY**



OMNI-PRESENCE



**TRUE
PERSONALIZATION**



TOTAL DATA CONTROL



**RISE OF A NEW
GENERATION**



**COLLABORATIVE
ECONOMY**



EXPERIENCE ECONOMY



**SUSTAINABLE
LIVING**



EXTENDED ENTERPRISE



**NEXT-LEVEL
ENGINEERING**





BUSINESS ESSENTIALS

Enabling future success

10.10155

Enabling future success...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

Due to ongoing technological advancements, the explosion of new customer interaction channels and changing customer behaviors, companies require a set of essential business enablers that will be vital to achieve future success.

BEST PRACTICE



Nike's FuelBand allows athletes to track their workouts and share performance online.

KEY ELEMENTS

BIG DATA



Translating the rapidly increasing amount of data into insights.

CLOUD



Enabling scalable IT systems that can be used as a service.

INTERNET OF THINGS



Connecting physical and digital "things" to achieve greater value.

ANALYTICS



Discovering meaningful data patterns and communicating findings.



POTENTIAL IMPACT ON FUTURE TRAVEL

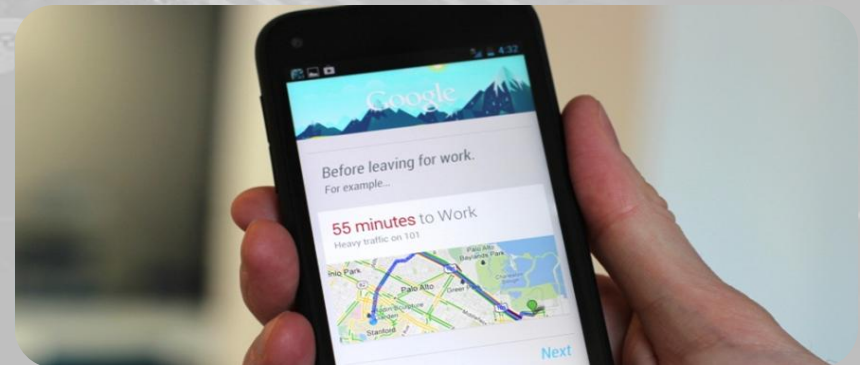


**PERSONALIZED NEXT BEST OFFERS
BASED ON ADVANCED ALGORITHMS**

Integrated information systems will determine the 'next best offer' for travelers by cross-referencing travel, holiday, hotel and food searches. They will use predictive algorithms to make original suggestions tailored to the preferred price range, peers and gender needs.

**PROACTIVE NOTIFICATIONS BASED
ON PERSONAL DIGITAL PROFILE**

Travelers will receive personalized information during traveling from data aggregation services (such as Google Now). They will tell travelers when to leave, how to drive and where to park in order to be on time for their flight.



Enabling future success...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



EXECUTING PRE-MAINTENANCE ON CARS AND AIRPLANES

Software technology based on the 'internet of things' could help to improve transportation safety and efficiency by detecting anomalies in the hardware or software of a car or airplane before the actual problem occurs.

TAKING SHORTER ROUTES BASED ON PLANE-TO-PLANE COMMUNICATION

Advanced software technology could enhance plane monitoring and allow them to take 'free routes' outside the predefined air corridors due to improved plane-to-plane communication. This could significantly reduce travel time and carbon emissions.



HUMAN-CENTRIC TECHNOLOGY

Improving our daily lives

Improving our daily lives...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

Human-centric technology empowers people in their daily lives, as it is designed to meet their specific needs. It empowers them and offers an intuitive experience. It does not expect people to adapt to the technology, as was often the case in the past.

BEST PRACTICE



Groupon's location coupons provide customers with discounts based on their current location.

KEY ELEMENTS

SEMANTIC SEARCH



Understanding intent and contextual meaning of search terms.

GEO-LOCATION



Assessing the physical, geographical location of an object.

SPEECH RECOGNITION



Translating spoken words into text or concrete actions.

RFID



Wirelessly transferring data to identify and track tags on objects.

Improving our daily lives...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL

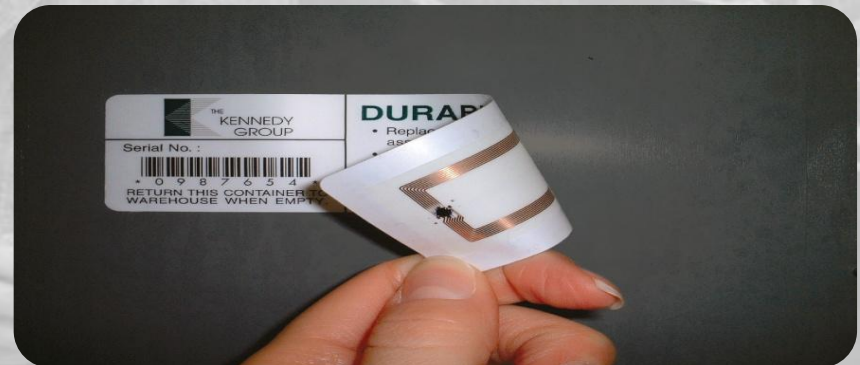


EASY AIRPORT NAVIGATION DUE TO LOCATION-BASED SERVICES

At the airport, location-based services will provide real-time information to travelers to help guide them through the terminal, telling them where to check in, board and exchange currency, while helping them to track luggage.

AUTOMATED BAGGAGE TRACK & TRACE USING RFID TECHNOLOGY

Personalized, smartphone-activated, digital bag tags will eliminate paper tags, tickets and boarding cards entirely and will help find a traveler's bags at any preferred moment with the help of radio-frequency identification (RFID).



Improving our daily lives...

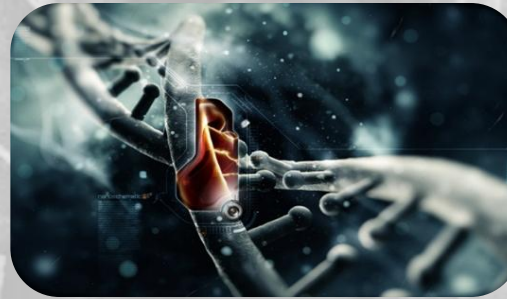
WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



ARTIFICIAL INTELLIGENCE

The science and engineering of making intelligent machines, which can perceive its environment and take actions that maximize its chances of success. Imagine them at the airport to assist you.



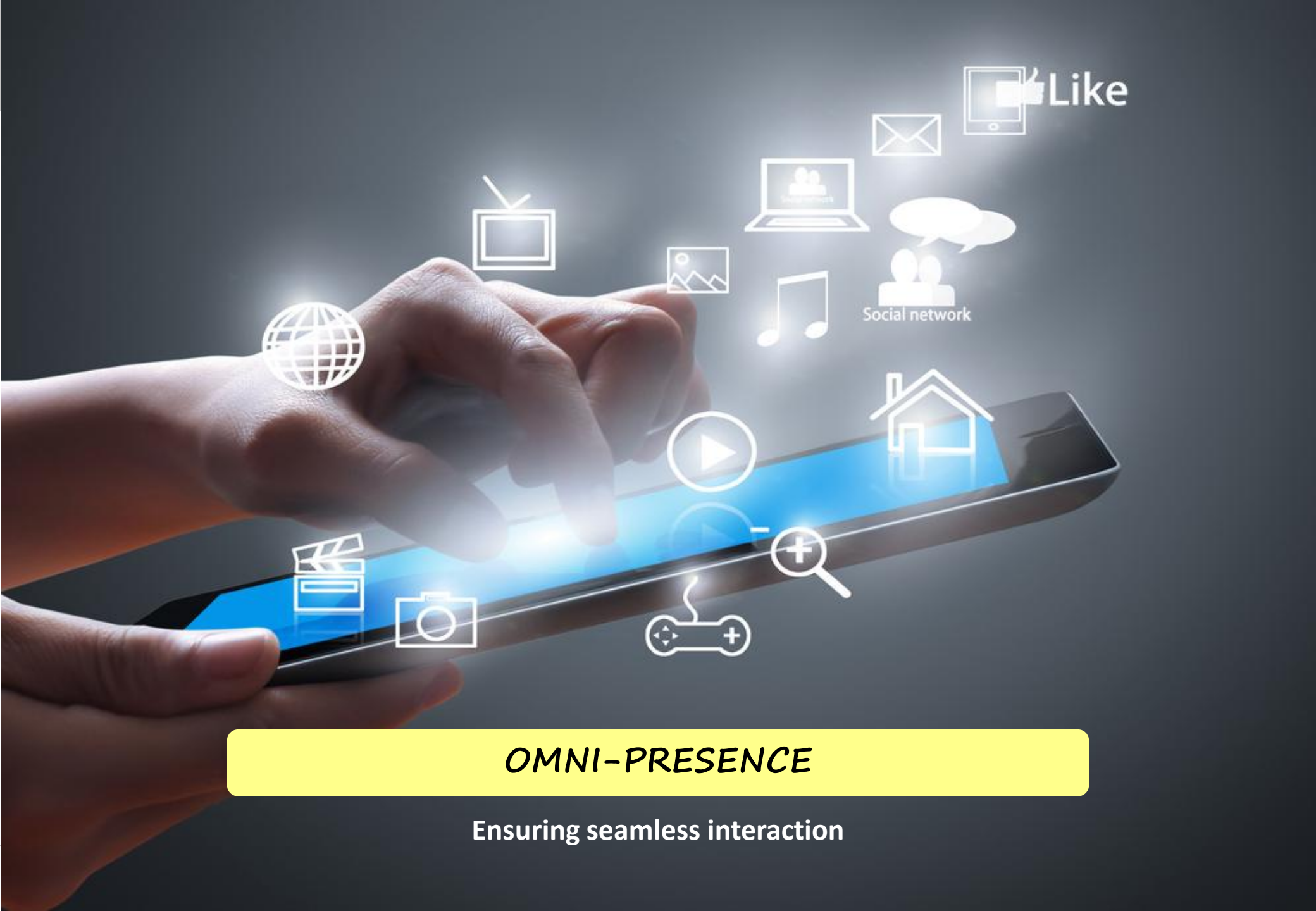
NANOTECHNOLOGY SENSORS

Manipulating matter on an atomic and molecular scale. Imagine people carrying on-body devices powered by microchips of seven nanometers in length. Biological threats will be instantly detected at border controls.



COGNITIVE COMPUTING

Offering synthesis based on information sources, as well as influences, contexts and insights. This way it is able to respond to the fluid nature of people and their problems. It could be your future travel muse.



OMNI-PRESENCE

Ensuring seamless interaction

Ensuring seamless interaction...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

Omni-presence is all about providing customers with a seamless experience through all available channels. It puts the customer at the centre of attention and allows them to switch channels without any hassle or limitations. Online and offline are fully integrated.

BEST PRACTICE



PowaTag's beacon platform enables customers to pick up promotional messages with any mobile device.

KEY ELEMENTS

(E)STORE



Choosing a physical shop experience or the convenience of online shopping.

MOBILE & APPS



Performing activities in a focused application environment, anytime and anywhere.

WEARABLES



Receiving notifications and communication on miniature electronic devices (e.g. smartwatch).

SOCIAL MEDIA

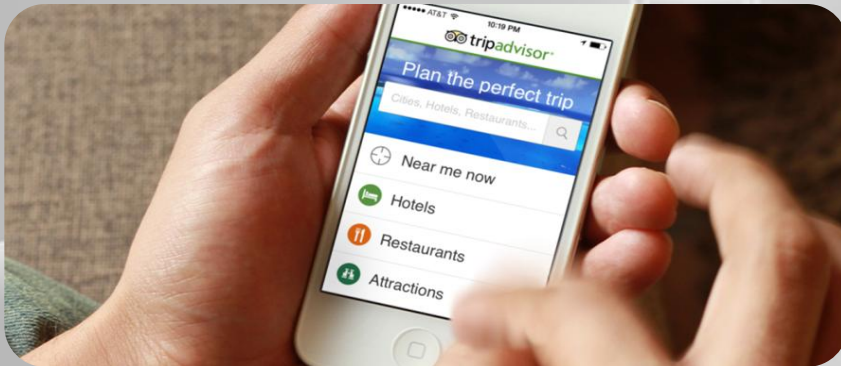


Creating, sharing or exchanging information in virtual communities and networks.

Ensuring seamless interaction...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



MOBILE APPS THAT PROVIDE AN END-TO-END TRAVEL EXPERIENCE

All-encompassing mobile apps will provide a comprehensive end-to-end customer experience. From booking, checking-in and boarding to navigating to hotels and buying additional services, future mobile apps will offer travelers a seamless experience.

BAG DROP AT DIFFERENT LOCATIONS

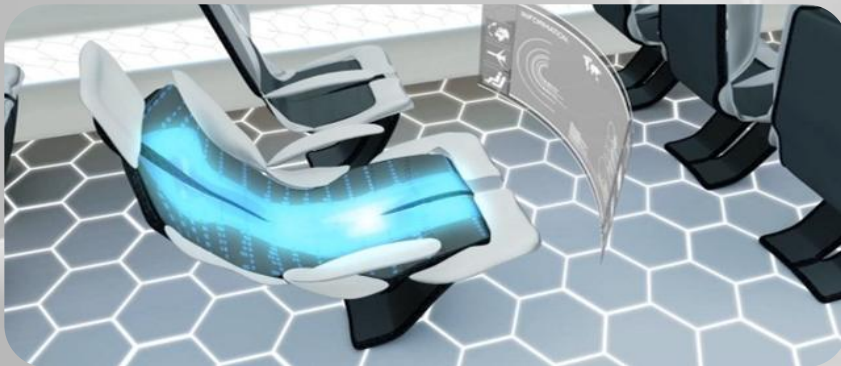
Automated bag drop-off points located across the terminal or close surroundings will make the life of future travelers a lot more convenient. Imagine the ease of selecting the drop-off point that is closest or most convenient for you on the way to catch your plane.



Ensuring seamless interaction...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



SMART CABIN

A combination of a personal flight entertainment system and a virtual office, connected to a fast 5G network throughout the entire flight. Imagine all the work you can get done while traveling to your next destination, using your own personal preferences and files.



INTERACTIVE WALLS AND MIRRORS

A revolution in entertainment and public space advertising, simplifying information transfer. In an airplane, passengers will be able to use the window screens to examine particular sights, surf the internet, or simply turn them off. In a hotel, travelers will watch a movie on the wall.



16:43

Good afternoon, Nicholas.

TRUE PERSONALIZATION

Offering one-to-one service

Offering one-to-one service...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

True personalization is the art of providing tailor-made and authentic offerings to one individual in line with the person's needs and wants. In a world of busy schedules, indefinite choice and information overload, customers are ready to receive personalized offers.

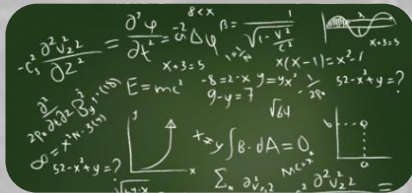
BEST PRACTICE



Amazon's recommendation engine offers alternative products based on customer's online behavior.

KEY ELEMENTS

INFORMATION OVERLOAD



Processing too much information, leading to a reduction in decision quality.

PERSONAL PROFILES



Building personal data profiles to understand and customer behavior.

1-TO-1 TARGETING



Providing personalized offerings based on available data.

SERVICE ECONOMY



Offering an increasing amount of services as part of product offerings.

Offering one-to-one service...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



FLIGHT CABINS WITH DIFFERENT ZONES

Flight cabins will be divided into different zones to cater for different kinds of travelers. Separate areas are created for those who want to relax, mingle with other passengers, sleep, or eat food in a restaurant setting.

CONTINUOUS AND REAL-TIME VIDEO LINKING TO FINETUNE TRIPS

Continuous and real-time video interaction with travel agents will increase flexibility and solve any problem during traveling. Services are instantly available and at reach wherever travelers are in their journey.



Offering one-to-one service...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



DIGITAL TRAVEL ASSISTANT

Each traveler will have an individual 'e-agent' that goes with them wherever they go, for example inside a watch or a small piece of jewelry. Travelers will be able to continuously engage and interact with their digital travel assistant to fine-tune their trip on the go.



"EVERYWARE" PERVASIVE COMPUTING

Technological devices are getting smaller and are virtually everywhere, helping society at any moment in time without getting in the way. It will be placed in clothing and even in contact lenses. Travelers will not be aware of their presence, but can always rely on it.

TRUE PERSONALIZATION

4



Travel
Tomorrow

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TOTAL DATA CONTROL

Deciding what to share with whom

Deciding what to share with whom...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

Companies are seeking to obtain and make sense of customer data more than ever before. Customers will only entrust their personal data to companies if it provides value-adding products and services to them, while providing transparency and solid protection.

BEST PRACTICE



Apple Pay enables paying on all digital devices with the ease of a single touch.

KEY ELEMENTS

DIGITAL IDENTITY



Identifying individuals for authentication and authorization purposes.

MOBILE PAYMENTS



Using a mobile phone to pay for (digital) services or hard goods.

DATA PRIVACY



Sharing data while protecting personally identifiable information.

HACKER ARMIES



Seeking and exploiting weaknesses in a computer system.



Deciding what to share with whom...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



AUTOMATED BORDER CONTROL WITH E-PASSPORTS

Biometric data cards known as ‘e-passports’ will replace traditional passports and allow border control to be automated. As a result, travelers will be able to pass through security quickly, making the travel experience more convenient.

PEER-TO-PEER E-PAYMENTS USING NFC TECHNOLOGY

Picture yourself in a small local market in a far, distant place, paying for your groceries with just one simple click on your mobile phone. Queues are avoided and expenditures are easily tracked.



TOTAL DATA CONTROL 5



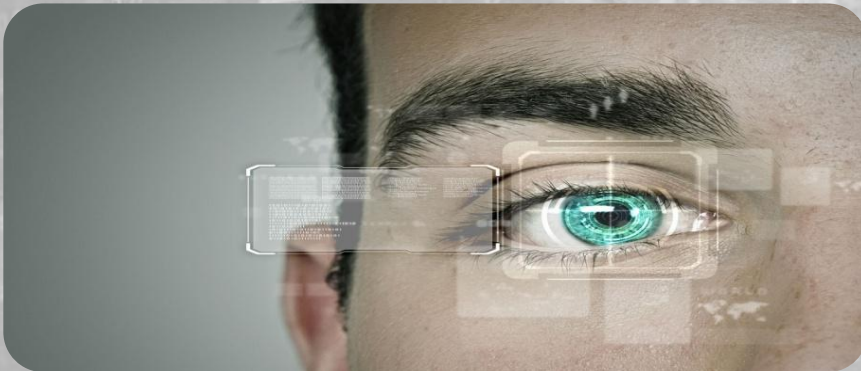
Travel Tomorrow



Deciding what to share with whom...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



BIOMETRIC FACIAL RECOGNITION

Border controls will operate a biometric immigration system that uses facial recognition to identify travelers. This technology will massively increase airport efficiency and reduce waiting times, as passports will no longer have to be checked when crossing borders.



ON-BODY MICROCHIPS CONTAINING PERSONAL DATA

On-body microchips, with all personal data securely saved, allows the recording, storing, processing and transmitting of data to and from designated devices. This technology makes immigration clearance more convenient and secure by only scanning the on-body microchip.

TOTAL DATA CONTROL

5



Travel
Tomorrow

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RISE OF A NEW GENERATION

Setting a new standard

Setting a new standard...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

The rise of the millennial generation will change the way we live and work. They will set a new standard by being tech-savvy, connected and strong multi-taskers. Companies need to find ways to appeal to the new millennial values, such as a healthy work life balance, collaboration, transparency and career advancement.

BEST PRACTICE



Virtusa's V+ internal social business platform leverages social technology to drive collaboration and engagement in business.

KEY ELEMENTS

MILLENNIAL MINDSET



Setting a new society standard due to a different set of values and intentions.

TRADING UP & DOWN



Focusing on low prices, while choosing selected 'high-end' offers to experience luxury.

GLOBALIZATION



Integrating world views through accessibility of transport and rapidly evolving technologies.

TECHNOLOGY SAVVYNESS



Adapting and embracing new technology faster than ever before.



Setting a new standard...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



SHARED COMMUNAL AREAS IN HOTELS

Millennials differ from their previous generations in the way they like to spend time, as they enjoy being in a communal and shared environment. Hotels will start reshaping their buildings to create such environments.

FOCUS ON ENVIRONMENTAL FACTORS DURING TRAVEL

Millennials are typically more concerned with the environment and make conscious choices in favor of environmentally-friendly concepts. Showing corporate social responsibility and leveraging durable energy is increasingly valued.



Setting a new standard...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



THE NEW DIGITAL STANDARD OF FUTURE SOCIETIES

Upcoming generations will be raised with digital all around them and have no sense of a world without information and communication technologies. As a result, digital will be at the very foundation of future societies.



MISSION-DRIVEN JOB SEEKING & VOLUNTOURISM

Besides career advancement and challenging work, millennials expect to get personal meaning and satisfaction from their jobs. They want to make a positive contribution to society. In line with this trend, 'voluntourism' will gain grounds.

RISE OF A NEW GENERATION

6



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COLLABORATIVE ECONOMY

Sharing is caring

Sharing is caring...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

Sharing access to products and services will further increase in popularity in favor of having individual ownership, often enabled by technology and peer communities. Examples are digital marketplaces and peer-to-peer travel advising & accommodation.

BEST PRACTICE



Airbnb offers a digital platform, on which travelers can book accommodation from a local resident.

KEY ELEMENTS

SHARING ECONOMY



Shifting from owning to sharing things, both physically and online.

BELIEF OF COMMUNITY



Being part of a (online) community that shares common values.

SOCIAL MEDIA



Creating, sharing or exchanging information in virtual communities.

BLOGS & VLOGS



Expressing opinions and sharing experiences by publishing content.

Sharing is caring...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



LOCAL CROWD SOURCING

Travelers will increasingly support local projects at their travel destination and get “travel perks”, such as a free place to stay in return. This kind of behavior provides new opportunities for local businesses, who could benefit from people visiting their local community.

PEER-TO-PEER TRAVEL BECOMES A MAINSTREAM WAY OF TRAVELING

An increasing amount of travelers will discover peer-to-peer review and accommodation platforms. Anyone can share their experience online, offer a place to sleep (couch surfing), rent out his house or offer guided tours.



Sharing is caring...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



ASSET LIGHT LIFESTYLE

In the future, people will have less possessions, as asset-sharing becomes mainstream. Sharing things with friends or even strangers will become a common thing to do.

COMMUNITY-BASED PLATFORMS

Community-specific, peer-to-peer platforms that integrate brand preferences, social media, user-generated content, peer reviews and selected contents (e.g. interactive video's, travel wiki's, blogs, etc) will allow future travelers to get inspired on travel destinations, hotels and other travel aspects.



EXPERIENCE ECONOMY

Looking for authentic moments

Looking for authentic moments...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

As travelers are increasingly looking for authentic moments, companies will start to orchestrate memorable events for customers, so that memory itself becomes the product. They will charge for the value of the transformation that an experience offers.

BEST PRACTICE



Singapore's Changi Airport is equipped with numerous, leisure options, ranging from a pool to cinema's.

KEY ELEMENTS

CHANGING VALUES



Obtaining social status based on experience rather than possession.

AUTHENTIC INSPIRATION



Looking for authentic experiences to find personal growth.

CAPTURE THE MOMENT



Capturing the moment is an essential part of sharing & remembering.

VISUALIZATION



Visual contents provide inspiration due to emotional triggers.

Looking for authentic moments...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



VISUALIZATION VIA 3D DEVICES

3D technology has large potential when it comes to creating travel experiences. Just picture yourself on a city trip using a 3D device as your personal tour guide, providing you with real-time information about the sights around you.

EXPERIENCE LIFE AS A LOCAL WITH HOME-TO-HOME EXCHANGE

What would it be like to be a New Yorker? With increasing value placed on authenticity and sustainability, home-to-home exchanges will provide a solid travel alternative. Think like a local, act like a local, live like a local.



Looking for authentic moments...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



VIRTUAL REALITY

Virtual reality will give travelers the opportunity to experience all the aspects of travel before they even step out of the door. Travel orientation will be much more visual than it is today, with people comparing alternative based on 'seeing' the difference.



3D HOLOGRAMS

A Skype-style, visual communication system will allow the future traveler to have real-time chats with his friends, family or travel assistant using 3D holograms. It will be the closest thing to literally having them in the room with you.



SUSTAINABLE LIVING

Saving the planet

Saving the planet...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

People are becoming increasingly aware of environmental issues and are starting to make more conscious decisions to protect the planet. Ongoing climate change will put sustainable development on the global agenda and demand a future-proof solution.

BEST PRACTICE



Velib's bicycle sharing system decreased the number of cars in downtown Paris.

KEY ELEMENTS

ECOTOURISM



Offering a low-impact, small-scale alternative to mass tourism.

RENEWABLE ENERGY



Using energy resources which are naturally replenished.

EMISSION LEGISLATION



Reducing the carbon footprint to have less environmental impact.

CORPORATE SOCIAL RESPONSIBILITY



Engaging in actions that contribute to social good beyond business.



WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



SOLAR-BASED AIRPLANES

Solar-powered airplanes have already been developed and will trigger new developments in mainstream air travel. Flying on solar power instead of kerosene would lead to a great reduction of CO2 emissions.

PURPOSEFUL TRAVELING

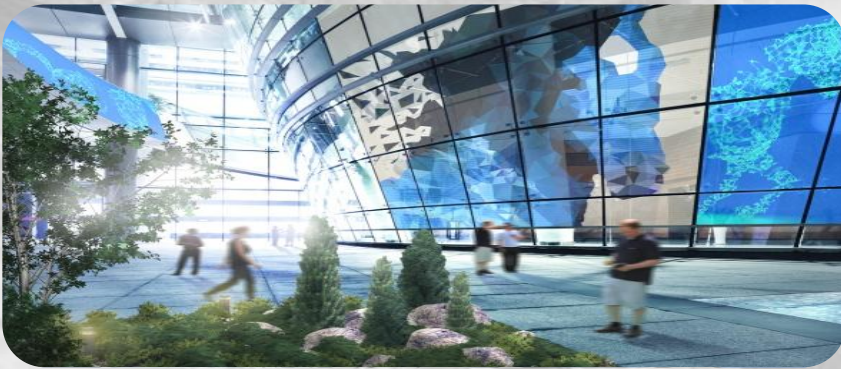
Traveling while giving something back to the local community will increase in popularity. Future tour operators will increasingly integrate seeing or contributing to local projects as part of the complete travel package.



Saving the planet...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



AEROVILLES WILL BECOME THE AIRPORT OF THE FUTURE*

The departure hall surroundings are intelligently designed to make transit a pleasurable part of the holiday experience. The airport of the future will contain plenty of 'green' and fresh air in order to provide a natural and relaxed atmosphere for travelers.

SMART DESTINATIONS

Smart destinations will no longer just pursue an increase of travelers. Instead, these destinations will match different traveler types to suitable areas and communities in line with their needs. As such, economic benefits will be maximized, while social and environmental costs are kept to a minimum.



EXTENDED ENTERPRISE

Preparing for a new way of working

Preparing for a new way of working...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

The extended enterprise contains of a loosely coupled, self-organizing network of companies that combine their efforts to provide products and services to the market. It leverages the power of innovation, digital capabilities and partner collaboration.

BEST PRACTICE



Burberry offers a unique fashion platform by blurring the physical and digital world and providing new services.

KEY ELEMENTS

BUSINESS MODEL INNOVATION



Rethinking business models to prepare for market disruptions.

DIGITAL PLATFORMS



Being part of a platform that intelligently fulfills customer needs.

ADDITIONAL SERVICES



Providing additional services to increase share of wallet.

PARTNERING



Meeting market demands creatively using cooperation.

Preparing for a new way of working...

WHAT WE EXPECT WILL HAPPEN

POTENTIAL IMPACT ON FUTURE TRAVEL



SOCIAL ENTERPRISE

Applying commercial strategies to maximize improvements in human and environmental well-being. Social enterprises do not aim to offer any benefit to their investors, except where they believe it will expand their capacity to realize their goals.

CO-CREATION

Viewing markets as platforms for companies and active customers to share, combine and renew each other's resources and capabilities to create value through new forms of interaction, service and learning mechanisms.



Preparing for a new way of working...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



OUTSOURCING ANALYTICAL JOBS TOWARDS DEVELOPING ECONOMIES

An increasing amount of analytical-based jobs will be moved to developing economies due to the highly educated and low-cost personnel. The great shift of economic power to the East provides a huge opportunity for the workers of the world.

SMART COMPANY

As work and life will start to blur together and companies will want to retain their talents, companies will make work conditions as comfortable as possible. This includes offering a variety of mobile offices at convenient locations, such as airports and trains.



NEXT-LEVEL ENGINEERING

Establishing true efficiency

Establishing true efficiency...

WHAT WE KNOW IS HAPPENING

TREND DESCRIPTION

An increasing amount of industries will be disrupted by technological innovations. Next-level engineering will bring together various novel ideas in a way that has true society impact. Better solutions will meet new requirements, inarticulated needs and existing market needs. The possibilities are endless.

BEST PRACTICE



Google Nest offers an app controlled thermostat that learns heating and cooling preferences over time.

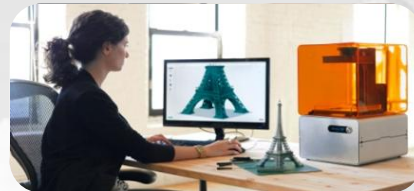
KEY ELEMENTS

DRONES



Delivering payloads via an aerial vehicle that flies autonomously.

3D PRINTING



Printing 3D objects based on an electronic data source.

CONNECTED CAR



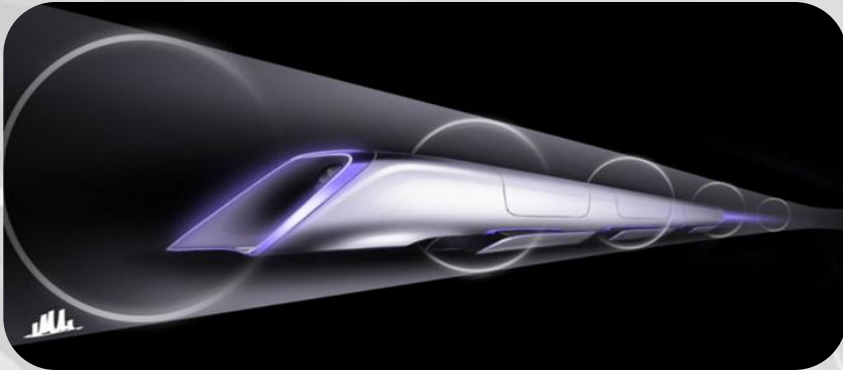
Sharing internet access to other devices inside and outside the vehicle.

SMART HOMES



Enabling occupants to remotely control or program home devices.

POTENTIAL IMPACT ON FUTURE TRAVEL



**SOLAR-POWERED CITY-TO-CITY
ELEVATED TRANSIT SYSTEMS**

Future trains will get a lot faster, whether it's based on hyperloop, steel tube or air-tight vacuum tube technology. Traveling from one city (and even continent) to another has never been easier or faster.

SPACE TRAVEL

Commercial flights to outer space will become reality in the near future, as Virgin Galactic plans to launch its first commercial space trip in 2016. Space travel technology will also show potential to shorten intercontinental flights.



Establishing true efficiency...

WHAT WE ENVISION MIGHT HAPPEN

FUTURISTIC CONCEPTS



SMART CITIES

Smart cities will use digital technology to enhance performance and wellbeing, reduce costs and resource consumption and engage more effectively and actively with its citizens. Key 'smart' sectors include transport, energy, health care, water and waste.



AEROMOBIL

Door-to-door aerial transportation without the need for roads, runways or other operating areas. True 'flying cars' will lack any visible means of lift, which allows them to be operated in urban areas and close to buildings, people and other obstructions. It sure sounds like science fiction, but progress is already being made.

Appendix:
Table of content

Macro analysis

Trend analysis

Customer insights

Cases on disruption

Workshop impressions

Planning



Travel insights: Key needs and pain points of leisure customers



Entertainment



Price/quality



Reliability



Hidden costs



Lack of communication



Long waiting times

Outbound leisure travel

Overview of common customer needs

Customer corridor

Overview of common customer needs

Become aware	Orientate	Book and pay	Prepare	Travel	Stay	Do (activities)	Get help	Return & Evaluate
<ul style="list-style-type: none"> • Get inspired on possible travel destinations • Find information about different countries • Get interesting offers • Get personal assistance • Invite travel exhibitions • The presence of culture in a certain country. 	<ul style="list-style-type: none"> • Get details on off season and peak season of a destination • Authentic reviews: Relies on friends & family member's recommendations • Investigate type of people at travel destination • Investigate expected weather conditions in different seasons • Good customer service and booking support 	<ul style="list-style-type: none"> • Travel cost & accommodation within budget • Determine period of travel • Look at different tickets and accommodations options and compare prices and quality • Availability during public holidays • Pay securely • Have different payment options • Transparent pricing • Use of loyalty programs 	<ul style="list-style-type: none"> • Plan route and transportation • Medical vaccines • Travel insurance • Seek information on Visa/transit policy/passport expire dates • Short time Weather forecast for destination 	<ul style="list-style-type: none"> • Prefer packages: Appreciation for the extras that hotels offer to their guests • Good and quick communication in case of delays • Affordable domestic transport options (taxi's) 	<ul style="list-style-type: none"> • Good internet connection • Locate the tourist information desk • Get local currency • The presence of fellow travelers • All inclusive vs. back-pack holiday 	<ul style="list-style-type: none"> • Explore the city, enjoy local food, shopping, have fun, rest and relax • Affordable activities at the location • Everything arranged (all-in package) vs. book and destination 	<ul style="list-style-type: none"> • Good customer service • Review sites such as Tripadvisor • Read public reviews on booking-, hotels- and restaurant sites. • Get personal assistance 	<ul style="list-style-type: none"> • Easy to create photobook • Give reviews and feedback on social media , blogs and network sites • Get the possibility to bring souvenirs from you holiday back in the transport



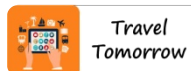
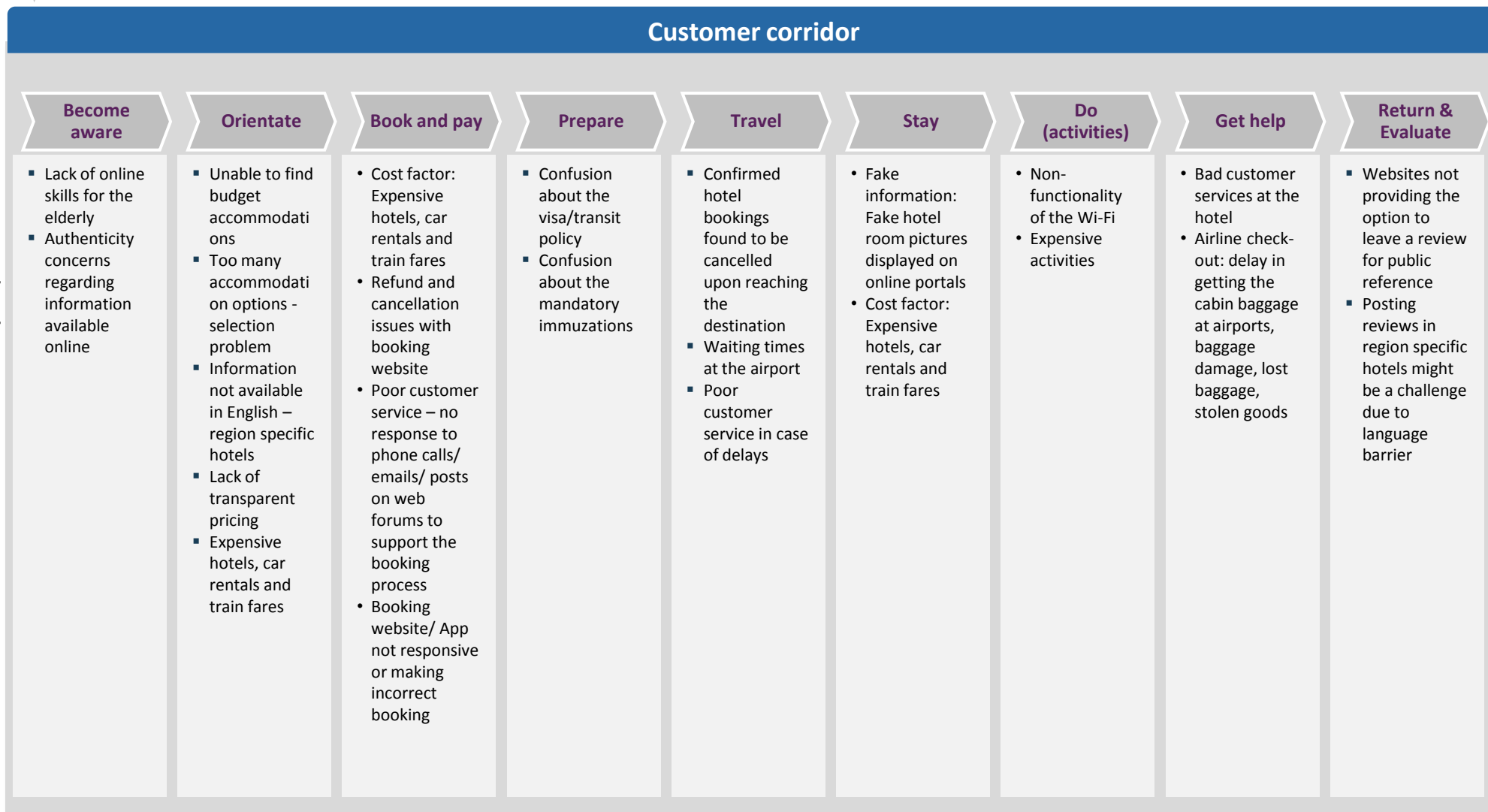
Travel Tomorrow



Outbound leisure travel

Overview of common customer pain points

Overview of common customer pain points



Travel insights: Key needs and pain points of business customers



Efficiency



Reliability



Loyalty programs



Travel time



Inconvenient hotel locations

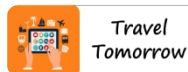
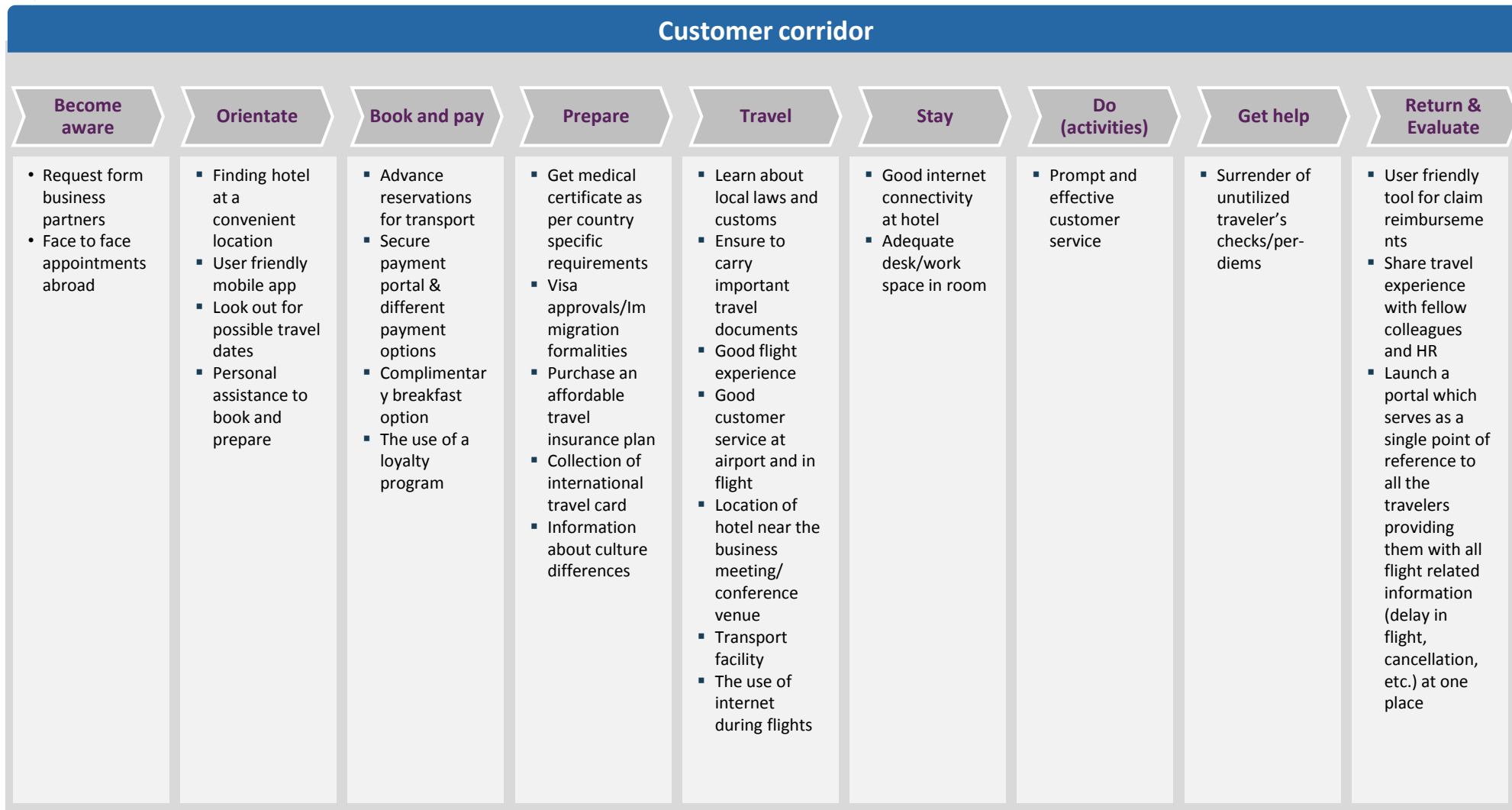


Itinerary changes (e.g. delays)

Outbound business travel

Overview of common customer needs

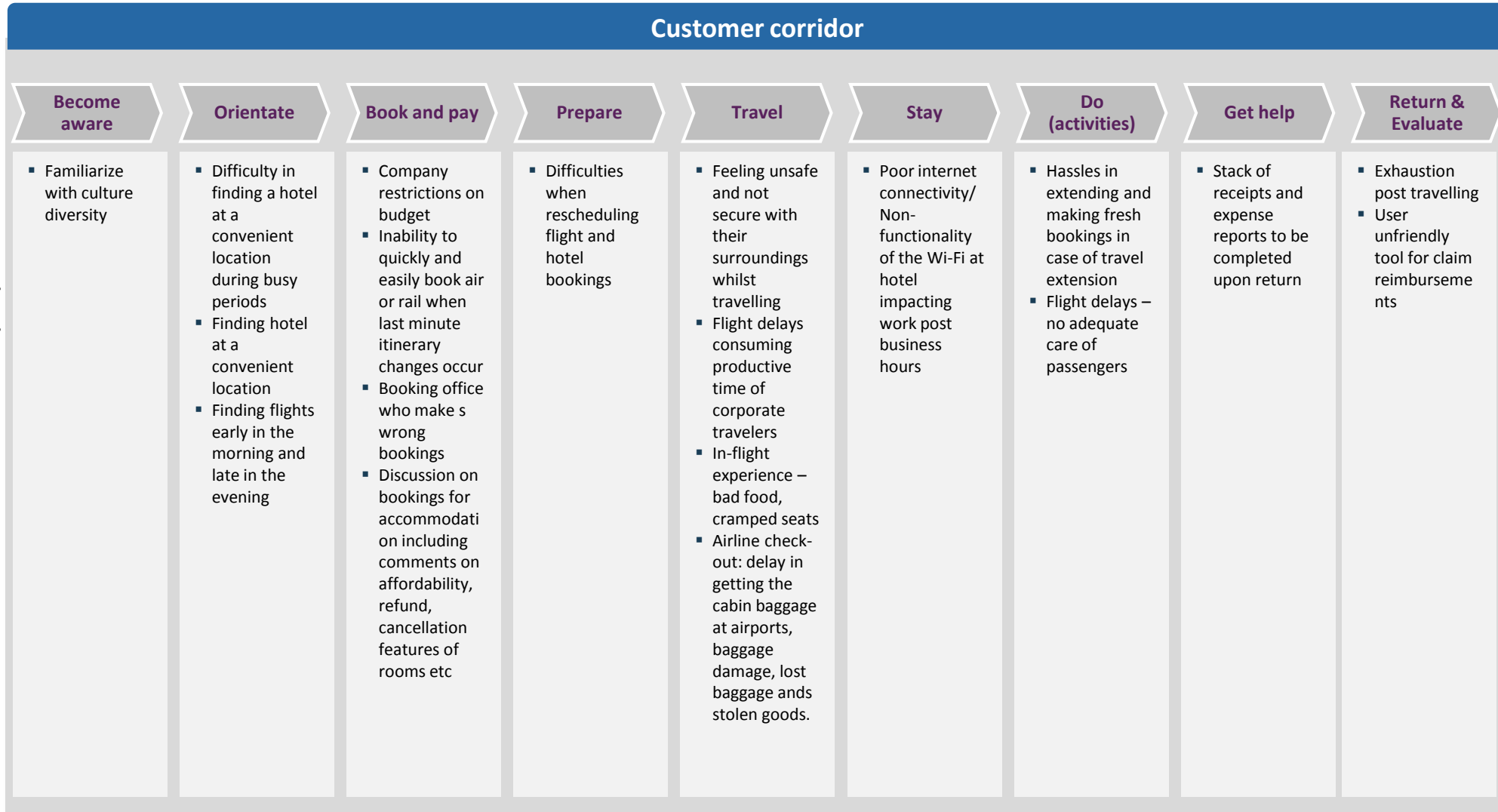
Overview of common customer needs



Outbound business travel

Overview of common customer pain points

Overview of common customer pain points



Travel Tomorrow



Appendix:
Table of content

Macro analysis

Trend analysis

Customer insights

Case studies on disruption

Workshop impressions

Planning



Case studies on disruption
Disruption that transforms an entire industry

CASE STUDY: THE MUSIC INDUSTRY



Before:

Global music market: \$28 billion in 2000

Disruption:

Consumer demand for singles and downloads is met by piracy and iTunes

After:

Global music market: \$15 billion in 2010

Disruption is able to decrease substantial market volume

Case studies on disruption

Disruption that makes companies struggle

CASE STUDY: NOKIA



Before:

Nokia phones were once a consumer favorite, delivering the greatest phone products on the market.

Disruption:

Other companies (such as Apple & Samsung) have captured consumers' imagination with superior devices.

After:

Consumers realized that Nokia was not reacting appropriately and left. They might never come back.

Disruption is able to shift market positions



Case studies on disruption

Disruption that destroys companies

CASE STUDY: KODAK



Before:

Kodak invented the first digital camera in 1975, but feared that investing in digital film would cannibalize their business.

Disruption:

Other companies embraced new technology and reaped the benefits.

After:

Kodak experienced decades-long decline as digital photography destroyed its film-based business model.

Disruption is able to destroy companies who are afraid of change



Appendix:
Table of content

Macro analysis

Trend analysis

Customer insights

Case studies on disruption

Workshop impressions

Planning



The experience of the first ASE workshop

Taking a quantum leap into the *future*

Best practices

Trends, *developments* & customer insights



Envisioning the future of travel



Inspiration on *singularity* & customer experience

Working in *groups*

Reporting back the findings



The experience of the second ASE workshop

Disruption and sense of urgency

Inspiration on Big Data

Uncovering why personas travel



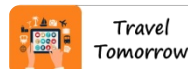
Envisioning the future of travel



Building future business models for the travel industry

Establishing industry (un)learning's

Working in groups & reporting back the findings



The experience of the third ASE workshop

Strategic positioning based on persona needs



Inspiration on *sense of urgency* and *industry challenges*



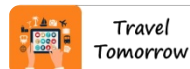
Working in *groups & reporting back* the findings



Defining industry issues and solutions based on the *business model canvas*

How to *change*: what is indispensable, necessary or desirable?

Personal takeaways from Travel Tomorrow



Appendix:
Table of content

Macro analysis

Trend analysis

Customer insights

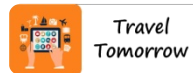
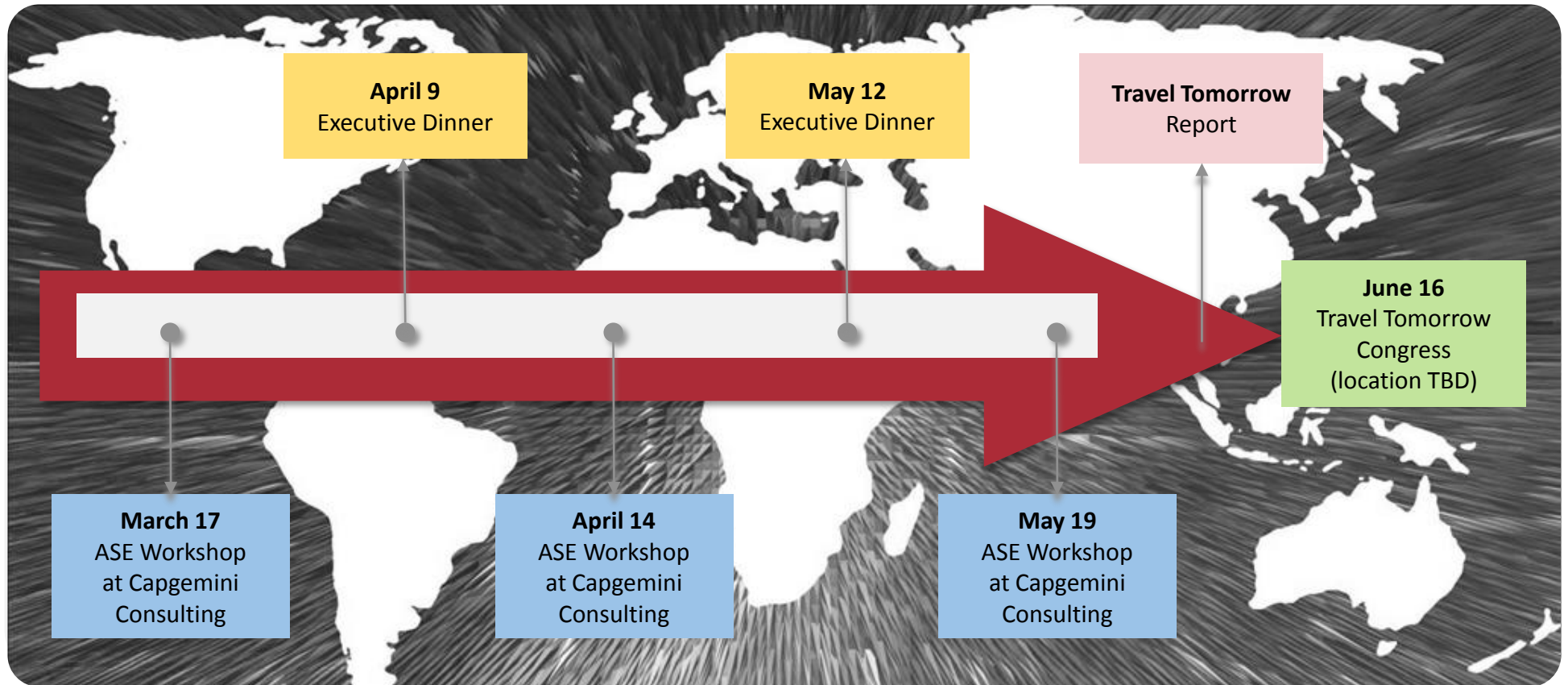
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Planning



Our journey...



Travel Tomorrow: Overview of participants

The following companies have made an invaluable contribution to the contents of this report. We **thank you for your expertise and enthusiasm!**

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Premium sponsors



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Travel Tomorrow: Overview of core team



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The end



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