



# TRAVELER TRIBES 2033

northstar | amadeus

## TRAVELER TRIBES' PURPOSE

# Helping you understand and **build for travelers in 2033**

Traveler Tribes 2033 reviews how 1.947bn travelers will evolve over the next 10 years<sup>1</sup>. The purpose of this is simple: **by understanding 2033's traveler, we'll understand the travel sector in 2033. This means we (the travel sector) can be prepared to give travelers the best travel experiences possible in 10 years' time.**

## UNDERSTANDING TRAVEL'S HUMAN SIDE

### **A sophisticated and diverse research approach**

We emphasize the future of travelers in this report. This is because travel is about humans, human behavior and the way humans think (this is why we refer to tribes of travelers – a collective

of combined thinking and behavior). But understanding what Traveler Tribes exist and how they think and behave is a complicated area. That's why Traveler Tribes 2033 is based on in-depth research that involved speaking to 22 experts from different fields – inside and outside of travel – then surveying 10,345 travelers from 15 countries and overall, collecting 5.84 million data points.

## TRAVELER TRIBES' KEY LEARNINGS

### **Future forces, traveler truths and four Traveler Tribes**

One of our goals is to identify the future forces – the incoming disruptions likely

to transform travel – by 2033. This ranged from the role of international families (where family members live in different countries) to changing the reasons we'll travel to how different forms of data will personalize travel.

We then combine these future forces with traveler traits – knowledge about how people make decisions and why – to understand if these future forces will be as transformational as experts predict.

This means we can understand if people REALLY want AI (Artificial Intelligence) to plan their trips, for example. Or if the 'IKEA effect' – where we place great value on something we've made ourselves – means we overestimate the appetite for AI's assistance? And will people really travel more sustainably? Or are we psychologically programmed to prefer watching others act sustainably on our behalf while we don't change our behavior?

<sup>1</sup> This number reflects how many travelers the 10,345 sample for our survey represents (1.947bn travelers)

## TRAVELER TRIBES 2033

At the heart of travel in 2033, we find four unique Traveler Tribes. Reassuringly, the biggest of these – representing 845 million people – is positive about travel’s future. They’re open to new technology and want to travel in more environmentally friendly ways.

But other Traveler Tribes are less certain.

One Traveler Tribe has an inherent distrust of technology and eschews the need to travel sustainably. Another is excited about travel’s future but fears AI will make it too predictable.

And there’s a Traveler Tribe torn between excitement about technology in 2033 and concerns about cybersecurity and data privacy.

Every Traveler Tribe has a unique value for the travel sector. And by understanding them we can prepare now and invest in the technology that improves how they travel by 2033.



FOREWORD

“ Twenty years from now you will be **more disappointed by the things you didn't do** than by the ones you did do. So throw off the bowlines, sail away from the safe harbor. Catch the trade winds in your sails. **Explore. Dream. Discover.** ”

Mark Twain

Travel provides continuous opportunities for adventure, exploration and growth. It speaks to our innate desire to discover new cultures, expand our horizons and connect with others. That is why working in travel is so rewarding.

Every traveler is different, each trip is unique, no experiences are the same. That's why Amadeus commissioned an independent insight agency – Northstar Research Partners – to understand travelers' complex behavior.

Part of this understanding was segmenting travelers into four Traveler Tribes. Segmentation is an established research method. But traditional approaches to segmentation are limited. Age, geography, location, socio-economic status are no longer accurate indicators of our behaviors, preferences, and predictors of how we will travel when used in isolation. Maybe they never were.

That is why this study is different.

It seeks to simplify the complex. To explore the forces of change. To identify the shifts taking place in our world. To understand how travelers are evolving. To look at the developing role of technology. And to make sense of what this means for travel in 2033.

It identifies four Traveler Tribes likely to emerge over the next ten years not as homogenous fixed groups, but signposts to how we, as travelers, may think and act.

By doing so we can support the industry to adapt in a way that places the 'human' at its heart. We can collectively innovate, bring fresh thinking, and better meet the needs of travelers in the coming years.

We have long advocated the Traveler Tribes approach as a way of anticipating the future. Our previous two reports, launched in 2006 and 2015, focused on the 'humanization of technology' in travel. They identified electronic traveler

identification, biometrics, 'super apps', social media and smart technologies as key drivers of transformation – all of which are present in our lives today – impacting how we shop, access entertainment, connect with others and travel.

What's next? We hope you enjoy the glimpse into our possible future in the following pages.



**Decius  
Valmorbida**

President, Travel, Amadeus



**Francisco  
Pérez-Lozao Rüter**

President, Hospitality, Amadeus

## INTRODUCTION

Over the next three years, nearly two billion people will travel at least once a year<sup>2</sup>. This makes understanding 2033's traveler economically enticing—not to mention environmentally essential, as travel modes such as aviation aim to reduce their carbon footprint, which currently stands at around 2% of all emissions caused by human activity globally.<sup>3</sup> This poses the question: how do we best prepare for 2033's traveler?

## OUR STARTING POINT

# Psychology

We start with a simple question: “Why do we like traveling?” It's an expansive question, too. We know that travel opens minds and builds bridges between cultures. But there's also a psychological aspect to it.

Industrial designer Raymond Loewy believes that decisions are often torn between neophilia (curiosity about new things) and neophobia (the fear of anything new)<sup>4</sup>. Travel is a rare instance of a phenomenon that both satisfies our neophilia and alleviates our neophobia. It fulfills our desire for new things by taking us to new places. It eases our fears, too: we can research the places we're going, and our trips aren't permanent.

<sup>2</sup> This number reflects how many travelers the 10,345 sample for our survey represents (1.947bn travelers)

<sup>3</sup> WTTTC Net Zero Roadmap; UNFCCC Brief on Aviation & the Paris Agreement)

<sup>4</sup> www.theatlantic.com

We believe that Loewy's perspective makes travel a truly human endeavor. Of course, there's more to traveling than just the psychological dimension, such as:

### Engineering (technology & transportation)

How else would we travel anywhere?

### Destinations

Without which, where would we visit?

### Economics

we can't ignore that travel before COVID-19 accounted for one in every four new jobs globally<sup>5</sup>

Nevertheless, we firmly believe that by understanding travelers as human beings, we can best understand how they'll behave in 2033. This means learning about their complex

psychology, how they make decisions, and—most complex of all—*why* they make them. However, understanding humans is tricky. To do this, we often speak to experts. But relying on expert opinion has three main flaws:

**1.**The false consensus effect means that we think our views are far more widespread than they actually are. The reality is: expert opinion belongs to the few. Not the many. And experts, by definition, need unique opinions to succeed professionally.

**2.**Experts are maximizers.<sup>6</sup> When it comes to their field of expertise, they want to make the best decisions possible. This is the opposite of non-experts, who are satisficers: they just want things to be “good enough.”

**3.**Ignoring experts isn't the answer, either. Non-experts' satisficing mindset means they can't think expansively enough about the future to understand evolution. Hence the famous Henry Ford quote: “If I'd asked my customers what they wanted, they would've said a faster horse.”

This means that we need diverse perspectives to understand 2033's traveler. To acquire these, we drew on multiple research touchpoints.

<sup>5</sup> www.wtttc.org

<sup>6</sup> Shahram Heshmat Ph.D, Satisficing vs. Maximizing, Psychology Today, 2015

## OUR TOUCHPOINTS

# Using cognitive diversity

Traveler Tribes 2033 is based on three forms of cognitive diversity, different thought patterns, ideas, and ways of solving problems:

### Methodological diversity

Speaking to both experts and travelers. This means neither optimism (typically shown by experts) nor skepticism (typically shown by the non-experts) distorted our view of travel in 2033

### Expert diversity

Speaking to experts from 11 fields, thus limiting our number of intellectual blind spots. These fields included the travel industry (travel associations and hotel providers). Experts in areas that impact the travel industry (sustainability and retail). And experts in behavioral science and psychology

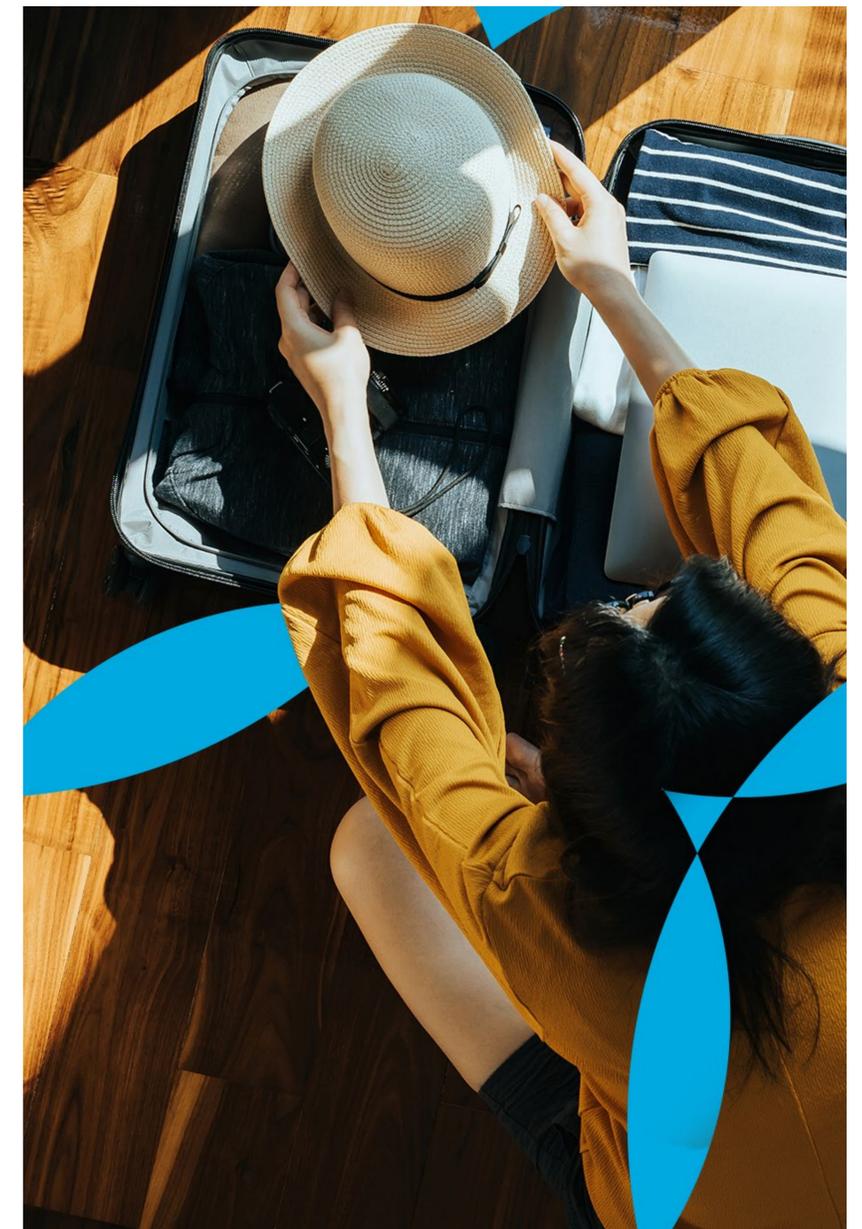
### Cultural diversity

Speaking to 10,345 travelers from 15 countries

One of Traveler Tribes' biggest challenges was creating a future view into 2033. This is hard. But our diverse approach to research allowed us to do this by:

- Drawing on forecaster's Philip Tetlock's work which states accurate forecasting must value diverse views and that the best forecasting teams are intellectually diverse <sup>7</sup>
- Using research techniques created by the Institute for the Future in our survey prior to asking travelers about 2033. This included asking travelers about what their age, income and family status will be in 2033, using writing exercises to open their mind up about what 2033 could be like and priming them with a written description of what will impact travel in 2033<sup>8</sup>
- Asking travelers how they think other people will behave in 2033 (rather than how they'll behave). A technique the University

of Chicago's Centre for Decision Research has shown to be a more accurate way of understanding people's true behavior



OUR VIEWPOINTS

## Being open to negative news

Predictions about the future tend to be either overly positive or overly negative.

We seek positive news because we're guilty of wishful seeing. We see what we want to see. We also remember negative news far more clearly than positive, as our negativity bias makes the negative words more memorable. Berkeley psychologist Felicia Pratto has shown that we're twice as likely to remember negative information as positive.<sup>9</sup>

Traveler Tribes 2033 accepted and embraced both human tendencies as part of our research approach. We've strived to present a balanced view of travel in 2033.

<sup>7</sup> Philip Tetlock, *Superforecasting: The Art and Science of Prediction*, 2015

<sup>8</sup> Jane McGonigal, *Imaginable*, 2022

<sup>9</sup> Felicia Pratto, *Automatic vigilance: The attention-grabbing power of negative social information*, 1991



# Traveler Tribes' cognitively diverse approach to understanding 2033's traveler

## STEP 1

We spoke to 22 experts from a variety of fields in a calculated order:

Looking inwards	Looking outwards	Understanding what's possible
<p><b>Speaking to travel experts to understand their view of travel in 2033</b></p> <ul style="list-style-type: none"><li>• Natalia Bayona, Director of Innovation, Education and Investments, UNWTO</li><li>• Christophe Bousquet, CTO (Retired), Amadeus</li><li>• Andy Hamer, Managing Director, CLIA UK and Ireland</li><li>• Wolfgang Krips, SVP Corporate Strategy, Amadeus</li><li>• Liz Ortiguera, CEO, Pacific Asia Travel Association</li><li>• Paco Pérez-Lozao Rüter, President, Hospitality, Amadeus</li><li>• Decius Valmorbidia, President, Travel, Amadeus</li><li>• Monika Wiederhold, EVP, Marketing &amp; Digital Transformation, Travel Unit, Amadeus</li><li>• Catherine Willis, Head of Guest Insights, IHG</li></ul>	<p><b>Speaking to experts in industries that impact travel to see how their work will change travel by 2033</b></p> <ul style="list-style-type: none"><li>• Dr Susanne Becken, Professor of Sustainable Tourism, Griffith University</li><li>• Alana Dillette, Associate Professor, School of Hospitality and Tourism, San Diego State University, Co-Director, Tourism RESET</li><li>• Futurist in Technology</li><li>• Olivier Hours, Head of Distribution Strategy, IATA</li><li>• Devin Liddel, Futurist, Teague Institute</li><li>• Ed Salvato, New York University, Tisch Center for Hospitality</li><li>• Frank Schirrmeister, VP, Solutions and Business Development, Arteris IP</li><li>• Matthias Schmeer, Strategic Partnerships Lead, Microsoft</li><li>• Nick Turner, Founder, Stratforma</li><li>• Paul Wilkinson, Product Lead, Deliveroo</li><li>• Professor James Woudhuysen, Forecaster, Southbank University</li></ul>	<p><b>Speaking to behavioral science experts to see the likelihood of inward/outward expert predictions resulting in behavior change by 2033</b></p> <ul style="list-style-type: none"><li>• Richard Chataway, Director of Behavioural Science at Gobeyond Partners, author of 'The Behaviour Business'</li><li>• Richard Shotton, Founder, Astroten. Author of 'The Choice Factory'</li></ul>

# Traveler Tribes' cognitively diverse approach to understanding 2033's traveler

## STEP 2

We surveyed 10,345 travelers from



### We understood who they are today

Their demographics, home composition, the products and technologies they're aware of/own

### We learned about how they travel currently

Their travel frequency, priorities, types of trip, planning habits

### We primed them to think about 2033

We did this by asking about their age, home composition and income in 2033. We used writing exercises to open their mind about what 2033 could be like. Then showed them a written concept about travel in 2033

### We protectively understood travel in 2033

We asked travelers about how they thought other people would travel in 2033. This is because we're better predictors of others behavior than we are of our own

- Our content was based on expert input
- Throughout we used subtle thought experiments to understand traveler psychology

This equates to 2,586 hours surveying travelers

During which we asked 248,323 questions

And created 5.84mn data points

## STEP 3

We spoke to 16 travelers from IN, UK and the US. 4 from each Traveler Tribe we had created to understand their – and their wider Traveler Tribe's – current lives and thoughts about the future in more detail

Traveler Tribes 2033 accepted and embraced both human tendencies as part of our research approach. We've strived to present a balanced view of travel in 2033.

#### OUR ENDPOINT

## Being able to answer five big questions that we believe are important for the travel industry's future

Our focus on human understanding, our embracing of cognitive diversity, and our balanced perspective mean we can answer these five questions for you and the travel sector:



## 1. Travel's trajectory

What will travel in 2033 be like?

**Page 12**

## 2. Traveler truths

How will travelers react to future developments?

**Page 19**

## 3. Traveler tensions

Is this human reaction going to be universal and consistent?

**Page 33**

## 4. Traveler Tribes

Who are 2033's Traveler Tribes?

**Page 34**

## 5. Traveler Tribes tomorrow

Where do we go from here?

**Page 70**

TRAVEL'S TRAJECTORY

# What will travel **in 2033** be like?

## Surprising similarity vs. definite difference

Let's remember what travel in 2013 was like. Some low-cost carriers didn't have mobile boarding passes. There were only 1,100 e-gates globally. Airbnb had just set up its first European headquarters. History suggests travel in 2033 will be very different from travel today. But does traveler opinion support this?

To find out, we asked travelers how different they thought traveling in 2033 would be. We did this without giving them any clues about what traveling in 2033 could look like.

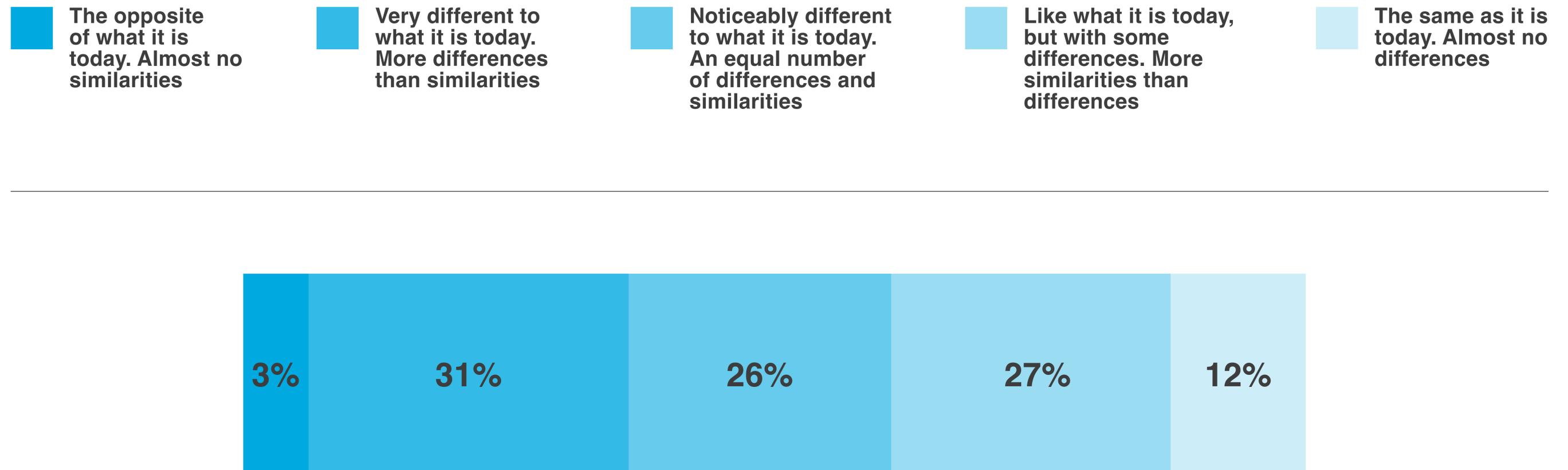
How did they respond? 34% of travelers think traveling in 2033 will be the opposite of or very different from what

it is today. A further 26% think traveling in 2033 will be noticeably different. But what will make travel different in 2033 won't be trends: which just represent a general direction of development. Instead, it'll be future forces: significant disruptions or transformations that result in a societal impact. This poses the question...



# Do travelers think travel in 2033 will be **surprisingly similar** or **definitely different**?

% of travelers stating travel in 2033 will be...



# ...What are the future forces that'll shape travel in 2033?

The experts we spoke to predict that seven future forces could change how we travel in 2033:

## THE FUTURE FORCE

### Political pressures

The change created: Political instability could threaten free movement, ushering in things like restrictions in travel and immigration policies.

“ Politics is in charge, and this is what's going to put people off taking a holiday. It's going to become expensive, a hassle, and maybe not entirely safe. ”

Professor James Woudhyusen, Forecaster,  
Southbank University

## THE FUTURE FORCE

### Demographic developments

The change created: Younger travelers will have even higher expectations that travel should be smooth and better connected. Older travelers will need better mobility solutions.

And the continued growth of international families (where family members, e.g., parents and their children, live in different countries) will mean we travel more.

“ Connection is another huge thing, this appreciation and recognition of the need to connect with friends, family, even just new experiences. Companies have to deliver across the board so people can get that connection they're going to be increasingly demanding. ”

Catherine Willis, Head of Guest Insights, IHG



## THE FUTURE FORCE

# Technological innovation

The change created: Technology will make travel smoother via super apps, biometrics, touchless technology, virtual reality (VR), and increased automation across the traveler experience, end to end.

“ Technology will continue to be a major driver of a very different experience of travel – across the entire travel journey. ”

Nick Turner, Founder, Stratforma Strategic Advisory

## THE FUTURE FORCE

# Artificial Intelligence (AI) advancements

The change created: AI will allow for advances in predictive transport maintenance and automated processes. Planes will be better able to predict when they need maintenance using AI, so flights won't be grounded. Security areas will need fewer staff members. Lines for food and duty-free will be shorter.

“ AI's impact on travel is huge. Both on the consumer behavior side and on the technology prediction side, mostly making customer experiences more pleasant. ”

Frank Schirrmeister, Senior Group Director, Solutions and Ecosystem, Cadence Design Systems



## THE FUTURE FORCE

# Data developments

The change created: The sharing of more forms of data will lead to more personalized and contextualized travel experiences.

“ Knowing the context around why people are traveling means we can make traveling better for them. So, if we know people are traveling for work, we will know to charge their business card not the personal one.

But we need people to give us their data, so we know their traveling context. People will be more likely to share such data with us if they know they're going to get something useful in return. ”

Paul Wilkinson, Product Leader, Deliveroo

## THE FUTURE FORCE Sustainability sensitivities

The change created: Sustainability is a collaborative effort aimed at creating long term impact. This means travelers, governments, businesses, and other organizations are aiming to reduce the negative impact of their travels on the planet. This will result in increased demand for sustainable travel and more efficient and sustainable modes of transport.

“ We need to include sustainability as part of our DNA, and act as responsible tourists. It’s not only a matter of the private sector, or of the government, it’s also up to us as tourists. ”

Natalie Bayona, Director of Innovation, Education and Investments, UNWTO

## THE FUTURE FORCE Post-pandemic preferences

The change created: The COVID-19 pandemic

created a demand for authentic, meaningful travel that improves our well-being. That demand will continue to grow.

“ There’s an interest in more community-based tourism, which at the heart of it is more authentic, it’s more driven and created with the local community. ”

Liz Ortiguera, CEO, Pacific Asia Travel Association

### TRAVEL IN 2033

## Exciting & empowering vs. concerning & controlling

We showed travelers a written description of what travel in 2033 will be like if these future forces create the changes experts predict<sup>10</sup>. We then asked travelers how this made them feel.

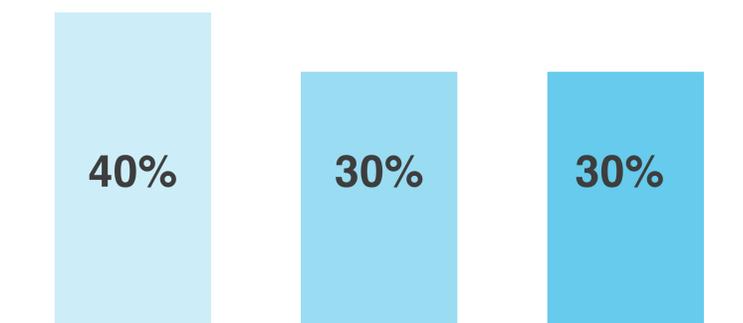
Of these travelers, 40% are positive about a 2033 where traveling reflects expert predictions. These travelers feel excited, empowered, and even comforted. But 30% of travelers voice negative reactions. They feel only scared, concerned, frustrated, and/or controlled.

<sup>10</sup> Full written description available in Appendix 1: Description of travel in 2033

## How will travelers feel about trips in 2033?

% of travelers stating travel in 2033 makes them feel...

- Only a mix of: excited, empowered and comfortable
- A mix of excited, empowered, comfortable AND scared, concerned, frustrated and controlled
- Only a mix of: scared, concerned, frustrated and controlled



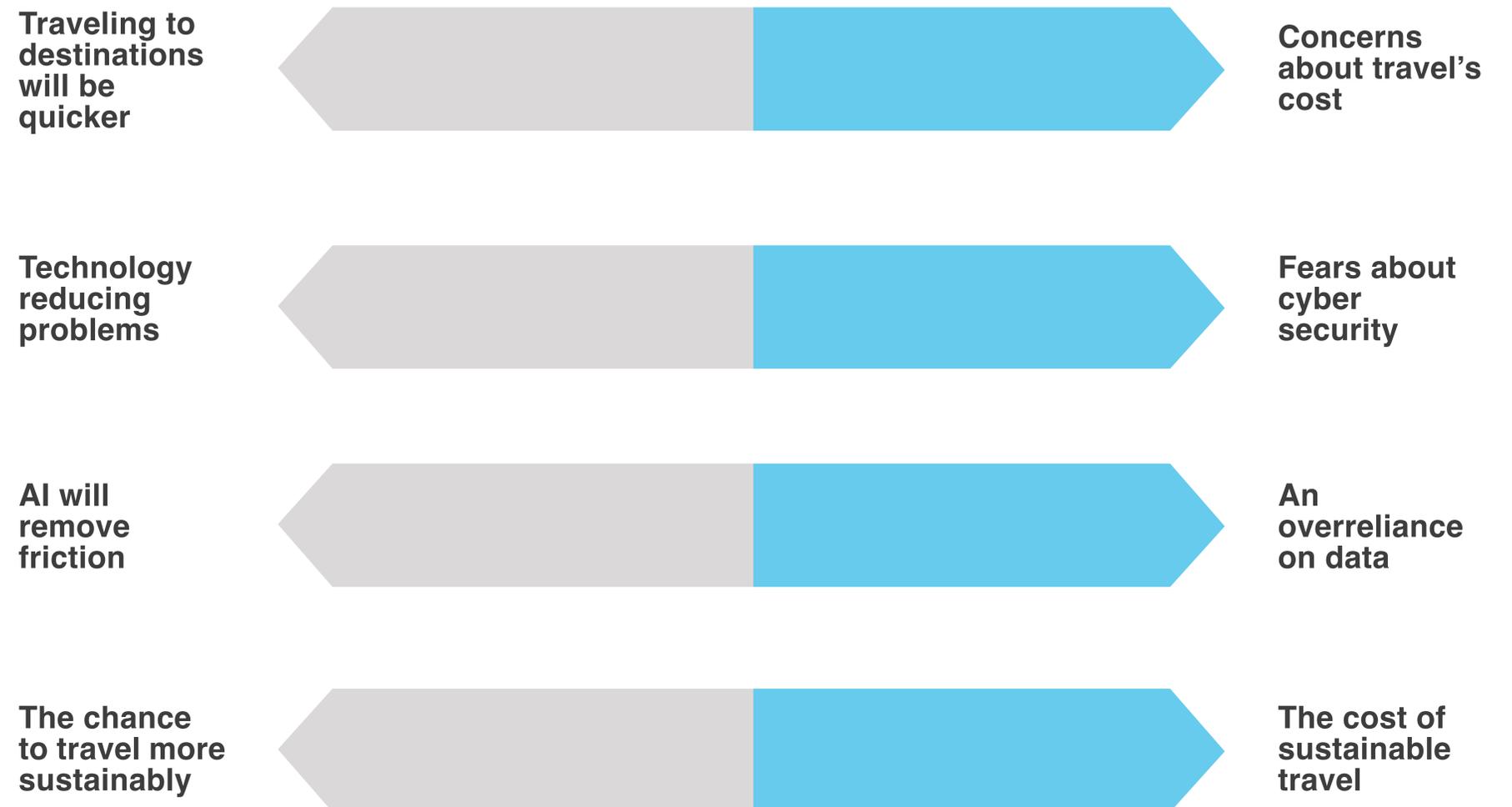
\*After exposure to a description of what travel in 2033 could be like (based on expert interview insights & future priming)

What's causing travel in 2033 to evoke such conflicting sentiments? The answer lies in the trade-offs between what makes travelers excited about travel in 2033 and what makes them concerned. We explored these by asking travelers to identify:

**The three positive aspects of travel in 2033 (from nine) that excite them the most**

**The three negative aspects of travel in 2033 (from nine) that concern them the most**

## Traveler trade-offs in 2033



**TRADE-OFF 1**

## Fast vs. frugal

Faster travel to destinations is what excites travelers most about trips in 2033. But faster travel also creates fears of increased costs: travelers' third-greatest concern about travel in 2033.

**TRADE-OFF 2**

## Reducing problems vs. one big problem

Travelers are excited that technology might reduce problems when they travel in 2033. But this also prompts concerns about cyberattacks and data security: travelers' top concerns about travel 2033.

**TRADE-OFF 3**

## Super smooth vs. dependent on data

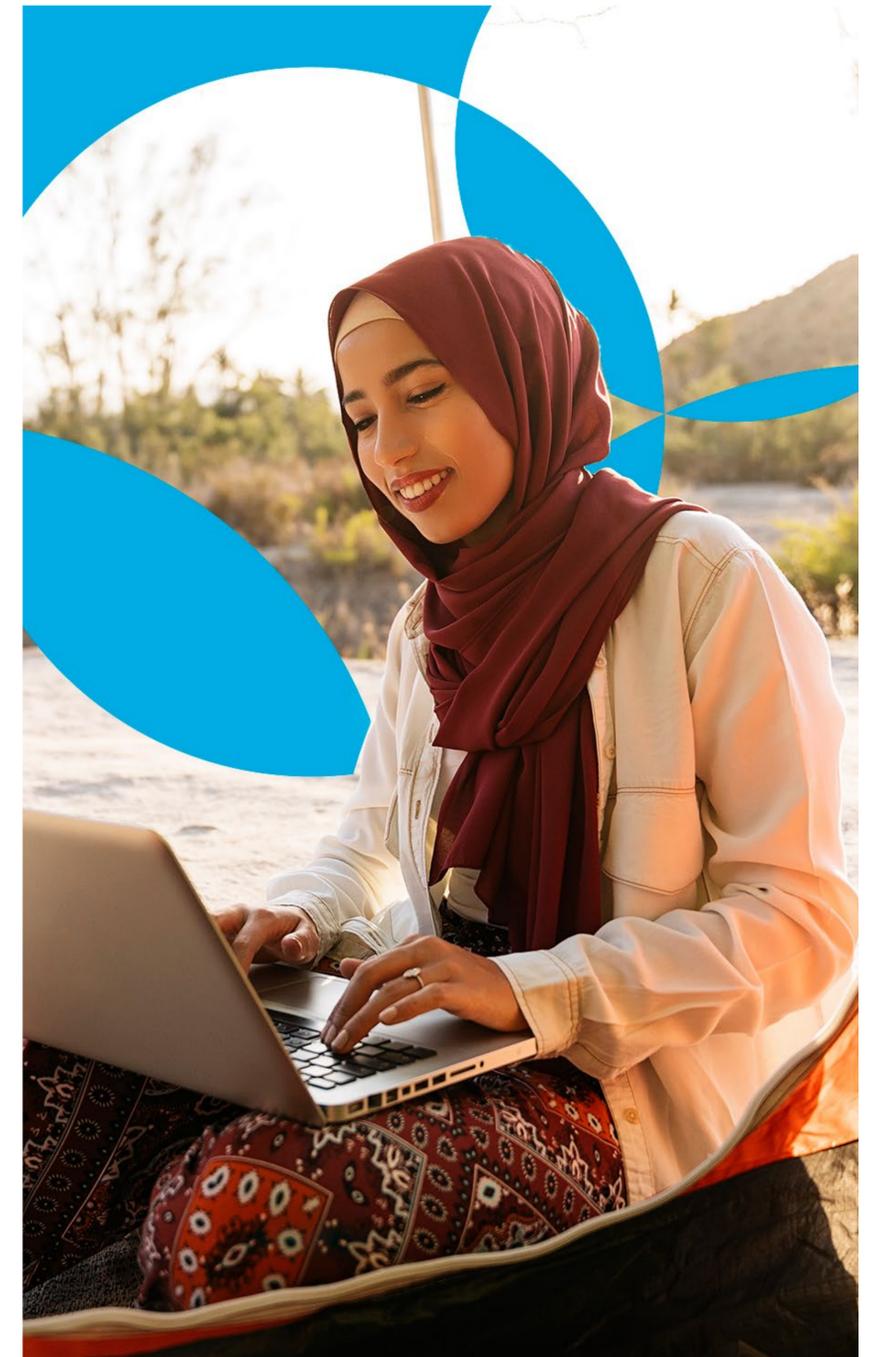
Travelers know that AI can help personalize trips and reduce their planning time. However, this all requires data. And dependency on data—coupled with fears about how safe data handling is—concerns travelers.

**TRADE-OFF 4**

## Sustainable vs. not affordable

The chance to travel more sustainably is 35% of travelers' main source of excitement for travel in 2033. However, 34% of travelers are concerned that more sustainable travel will cost more.

Future forces are important in shaping travel's future. But there's more to consider.



TRAVELER TRUTHS

# How will travelers react to future developments?

Future forces will be important in shaping travel in 2033. But how people react to these forces is even more important.

Will future forces change traveler behavior or trigger resistance?

Will they create new habits or strengthen existing ones?

The answer to these questions lies in understanding human thinking and behavior—travelers' traits—and linking this understanding to future forces.

Doing so creates 'traveler truths,' and we need to understand both the importance of these truths and how they'll impact 2033's traveler journey.



TRAVELER TRUTHS

# Travelers' reaction to future forces

Traveler truths are important, as they combine the two areas key to understanding travelers in 2033:

## Future forces

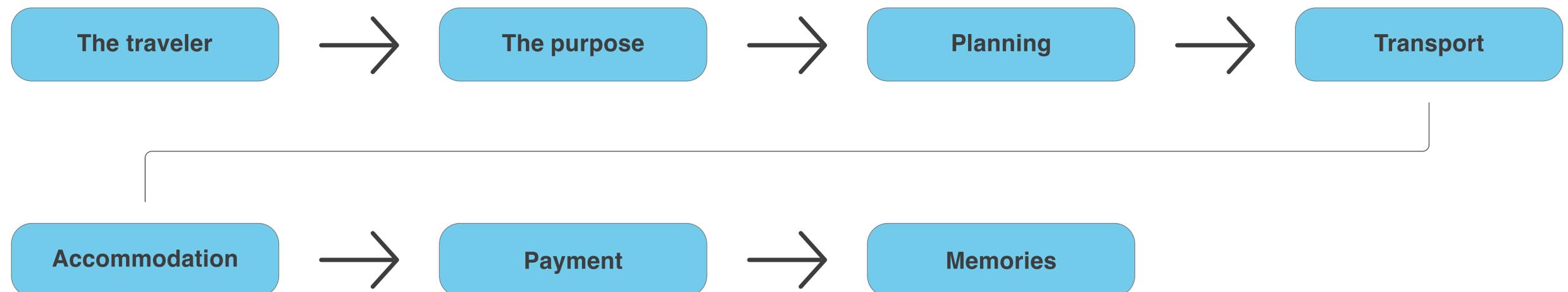
these will shape the environment in which travel will take place in 2033

## Traveler traits

knowing how travelers think and make decisions within the environment created by future forces

To uncover 2033's traveler truths let's start by understanding 2033's traveler experience from start to finish.

## The traveler experience



## THE TRAVELER

# Demographics vs. psychographics

A younger, internationally minded demographic will be 2033's most frequent and enthusiastic travelers. This is partly because there's a greater chance these travelers will have global families, leading to more travel. That's why 48% of travelers say that "trips to see their family/friends" will be more frequent in 2033.

“ Families are spread more and more around the globe, and that's a driver that moves people trying to reconnect. ”

Monika Wiederhold, Executive Vice President, Marketing & Digital Transformation, Travel Unit, Amadeus

Experts predict 2033's travelers will be better informed about their travel plans, risks, and expected outcomes. Human understanding suggests this will evolve into a traveler truth. This is because 68% of travelers are prone to ambiguity aversion<sup>11</sup>. As a result, they prefer definite outcomes and look to avoid risks. Being well-informed will safeguard travelers from unnecessary and unknown risks.

The future forces shaping who will travel in 2033 combine well with human understanding to suggest they are indeed traveler truths. Except one.

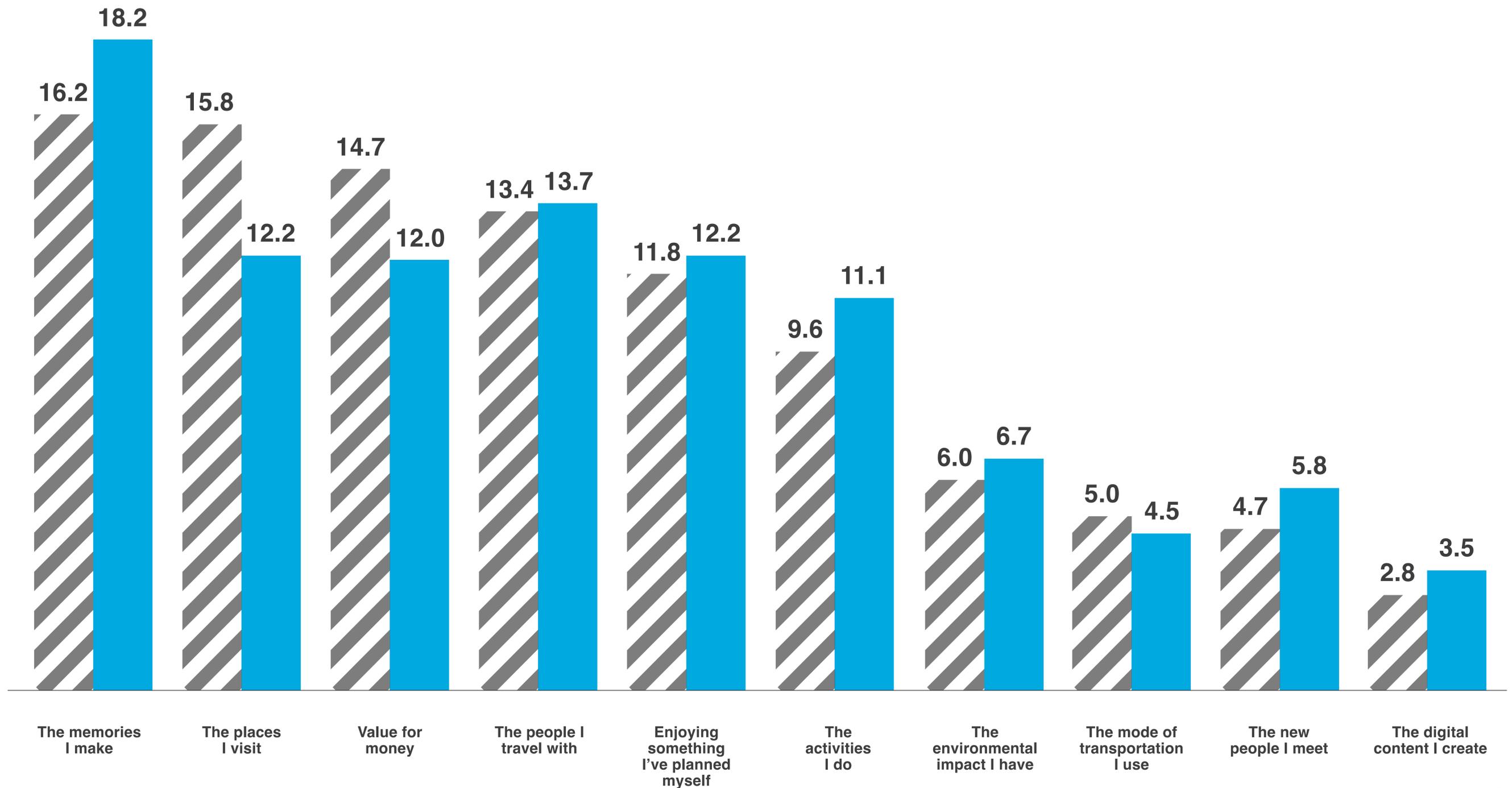
And this is the assumption that Gen Z travelers will have different expectations vs. other travelers. However, the traveler truth is that Gen Z value similar things about travel as other age groups.



<sup>11</sup> Ambiguity aversion was measured by understanding if travelers would rather rent a jeep for a two-day excursion of 150–220 miles priced at either a daily rate of £150/local currency equivalent, or a per-mile rental rate of £1.60/local currency equivalent per mile. Travelers who preferred the fixed rate are ambiguity averse.

## Are generational traveler priorities that different?

Travel priorities for **non-Gen Z travelers** and **Gen Z travelers** scored between 0-100. 0=least important.



This isn't to say Gen Z aren't unique in other ways. David Halpern's book 'Inside the Nudge Unit' shows how habits do harden over time. And younger people are known to be more susceptible to other's influence.<sup>12</sup> But 2033's traveler truth is that today's Gen Z won't evolve into being as unique as we think.

#### THE PURPOSE

## COVID-19's consequences and a contextualization cocktail

The COVID-19 pandemic triggered future forces that will continue to change how and why people will travel in 2033.

These changes will include more trips to reconnect with nature and loved ones, as well as more travel focused on improving health and well-being.

This is because the COVID-19 pandemic created a scarcity of travel and human interaction.

But how does this observation fit with the traits that influence how travelers make decisions?

“ As opposed to ‘I need to get away, so I’m going to a beach,’ we’re seeing people saying, **‘I want to reconnect,’** because, during COVID-19, we had to disconnect. People crave community. ”

Alana Dillette, Assistant Professor, School of Hospitality and Tourism Management, University of San Diego

When something is in shorter supply, we assume it's of greater value. COVID-19 created a previously unthinkable lack of travel opportunities and chances to improve health and well-being. Given this alignment between a future force and human traits, it's unsurprising that 60% of travelers believe there will be more trips to improve health and well-being in 2033.

Another form of travel expected to grow in 2033 is trips that provide unique experiences. The MAMAA (Meta, Alphabet, Microsoft, Amazon and Apple) companies have long fed this future force by using data to tailor what users see and believe. This targeted use of data to shape user experience also triggers a human trait known as the 'cocktail party effect': we filter out much of what we're exposed to, but things with personal relevance grab our attention. This almost perfect

alignment between future force and traveler traits means that in 2033, 60% of travelers will be more likely than they are today to travel in search of unique and authentic experiences.

#### PLANNING

## Technology must embrace psychology

How travelers plan trips in 2033 is where the future forces of technological innovation and AI advancement meet head-on with travelers' psychological traits. These future forces must align with travelers' psychological traits to complete technology adoption's "last mile".

Consider technology and AI's role in planning trips. These can be helpful in providing travel inspiration and supporting trip planning. But this doesn't mean that travelers want to outsource trip planning to technology entirely. This reflects a bias known as the "IKEA effect": people value the things that they create themselves. Traveler sentiment bears this out: 83% of travelers say that they want to contribute to planning their trips in 2033.

There's another reason travelers won't let technology own the trip-planning process in

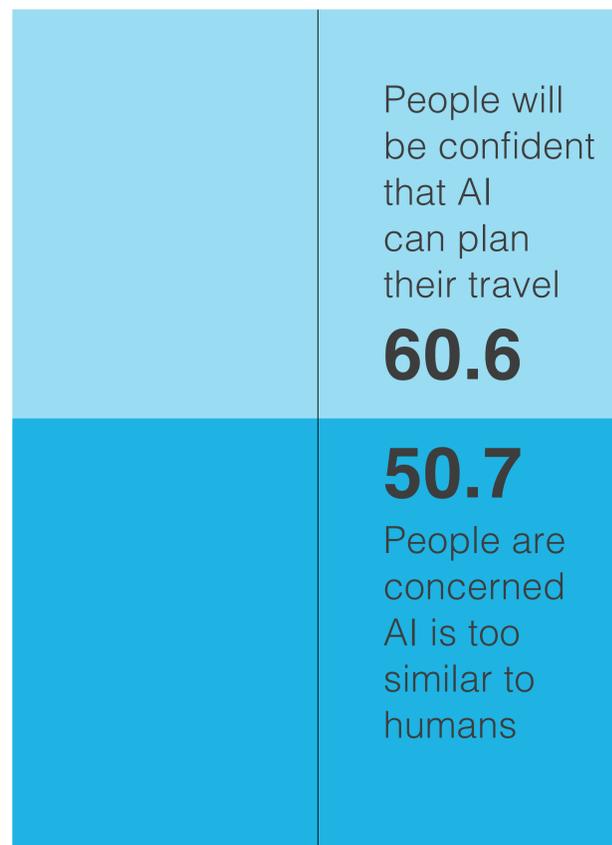
<sup>12</sup> Jennifer Wosmek, Bethany's Elevator Experiment, 2011



2033. That reason is control. We like to be in control. We don't like to surrender it. Especially not to an algorithm in a world where human interaction is felt to signal safety and confidence. That's why travelers state that AI, to be trusted to plan their travel, must be 61% comparable to humans. However, travelers are concerned by AI that's 51% comparable to humans.

## The AI planning paradox

### 100 – AI is exactly like people



### 0 – AI is nothing like people

Here's the truth: travelers enjoy planning trips. They're not going to leave it to AI entirely. The technology built must respect this desire if it's to have a role in shaping travel in 2033. But what about specific emerging technologies?

Super apps (apps that combine tools and content from all major apps) will allow travelers to travel more smoothly by having everything they need in one place. Super apps appeal to the fact that humans are cognitive misers: that is, we default to the easiest option. However, super apps will have to overcome the goal dilution effect. That is, the more singular something is in its purpose, the more effective we believe it will be.

Conversely, the broader the claim, the less likely we are to believe it. Given that super apps' promises are sweeping and generalist, the goal dilution effect is a significant hurdle, especially as 72% of travelers are prone to it.<sup>13</sup>

<sup>13</sup> Travelers are defined as being prone to the goal dilution effect if they prefer to use different apps with individual ability to plan specific parts of the trip vs. one general app with broad expertise to plan all parts of the trip.

In 2033, Virtual Reality (VR) and the Metaverse will allow travelers to try trips out in the virtual world before signing up for the real thing. VR previews fit well with the human trait of loss aversion; we believe that VR previews will save us from making decisions we then regret. Hence, in 2033, 51% of travelers expect to be using VR previews as part of their planning process.



## TRANSPORTATION

# Bridging the gap between what travelers say and what they do about traveling sustainably

As businesses, policy makers and governments continue to create options to travel sustainably, the future force of sustainability will likely keep its current momentum between now and 2033. But this future force collides head-on with three significant traveler traits:

**1. The say-do gap** – the discrepancy between what we say we'll do and what we do.

Does this mean that people's stated intent to travel more sustainably in 2033 won't translate to new behaviors?

**2. The bystander effect** – we often neglect to act in the face of a problem when we expect that others will act.

Might travelers think that adopting sustainable travel methods in 2033 is others' responsibility?

**3. The bias toward "smooth" travel** – travelers have a clear desire for maximally efficient travel processes. Will they accept travel that they perceive to move more slowly (despite some forms of sustainable travel being smoother than traditional options) or takes additional steps?

“ When you look at specific behaviors related to sustainability, the things that people are willing to do are things they already do at home like recycling, topping using single use plastic, or using the same bedding for a week. ”

Richard Chataway, BVA Nudge Unit, Author of the Behavior Business



In short – and setting aside the role of legislation to limit the negative impact of carbon emissions from aviation – will these traveler traits play a role in preventing travelers from sharing the responsibility of more sustainable travel with other parts of the travel sector in 2033?



## Standby to be more sustainable? Or bystander to watch others act?

% of travelers stating this is the most likely way people will travel more sustainably in 2033

**Travel on a plane that uses biofuel**

**34%**

**Regularly use virtual meetings for work instead of travelling for in-person meetings**

**28%**

**Use a carbon footprint calculator to measure my trip's impact on the planet**

**19%**

**Support a limit on how many miles of international travel people are allowed**

**11%**

**Sometimes visit a destination virtually instead of physically**

**8%**

Dependency on others to act/  
lesser impact on our own  
travel experience

1. While 35% of travelers say that the chance to travel in more environmentally friendly ways in 2033 excites them, 63% aren't willing to pay more for a flight with biofuel.

2. When shown five sustainable transport options in 2033, only 19% of travelers say they're very likely to use one that requires them to act or make a notable and obvious sacrifice (by supporting a limit on how many miles of international travel people are allowed or sometimes visiting a destination virtually instead of physically). Is the truth that travelers are looking to others to take the lead in protecting the planet? Potentially. However, travelers aren't expecting much help from AI on this front. Only 29% of travelers totally trust AI to plan their trip's environmental impact.

3. If slow travel (overnight services, autonomous cars, rail travel etc.) can create a positive experience, it will resonate with the 25% of travelers who are open to positive friction (where an experience is slowed down and does not trigger a negative reaction). However, for 44% of travelers, being able to arrive even faster at their destinations is what excites them most about travel in 2033.

## ACCOMMODATION

# New accommodation to shake up the status quo

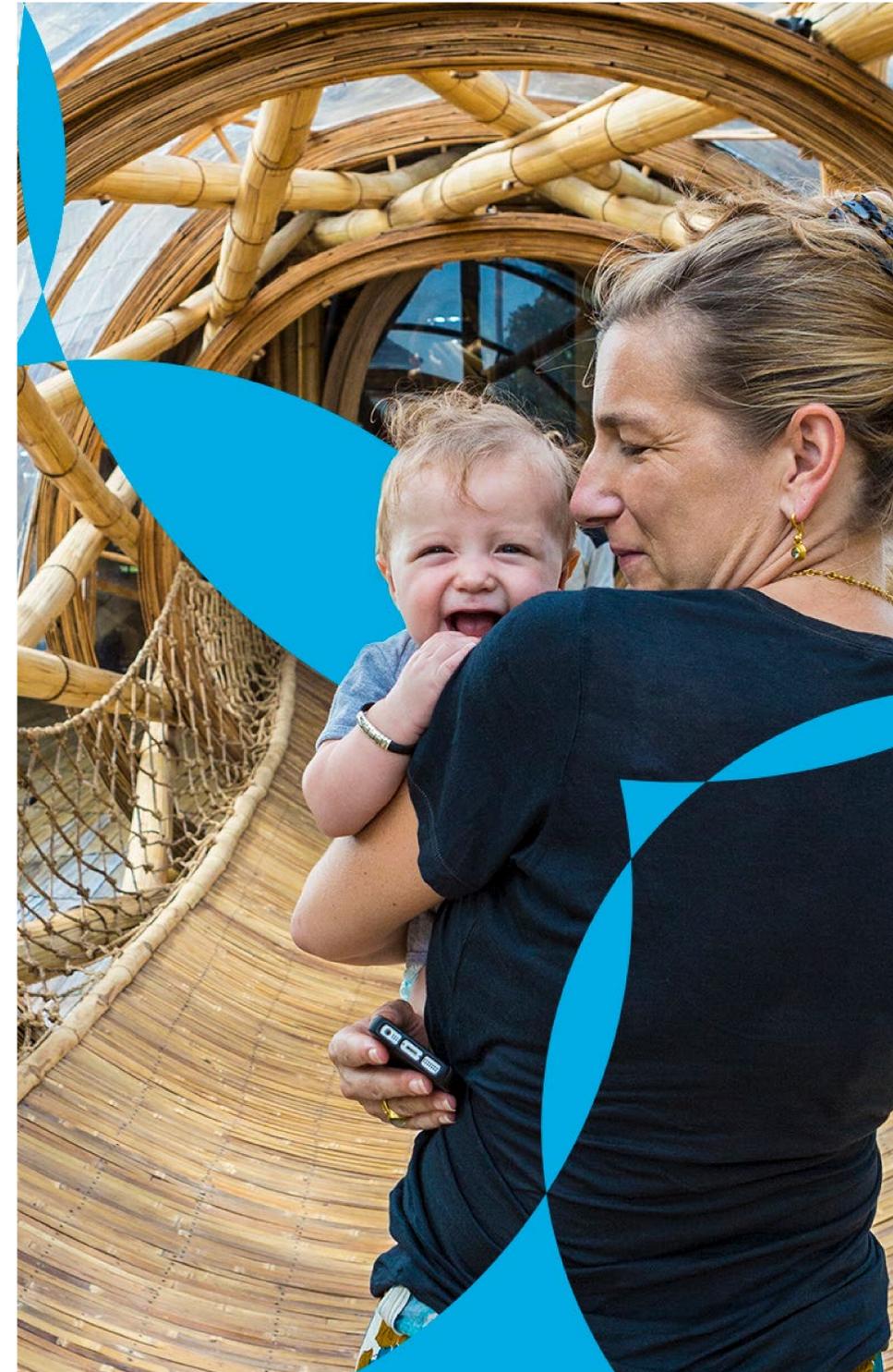
The future forces of authentic and eco-conscious travel will shape 2033's accommodation choices.

In 2033, more real homes will be available as traveler accommodations, and eco-hotels will be more widely accessible.

But travelers will only use these new accommodation forms if they overcome a psychological barrier: the status quo. The status quo bias means 62% of travelers prefer bigger, well-known brands to smaller, independent brands. Research has shown that to compel people to choose a new proposition, it must offer 2.6 times the status quo's value<sup>14</sup>.

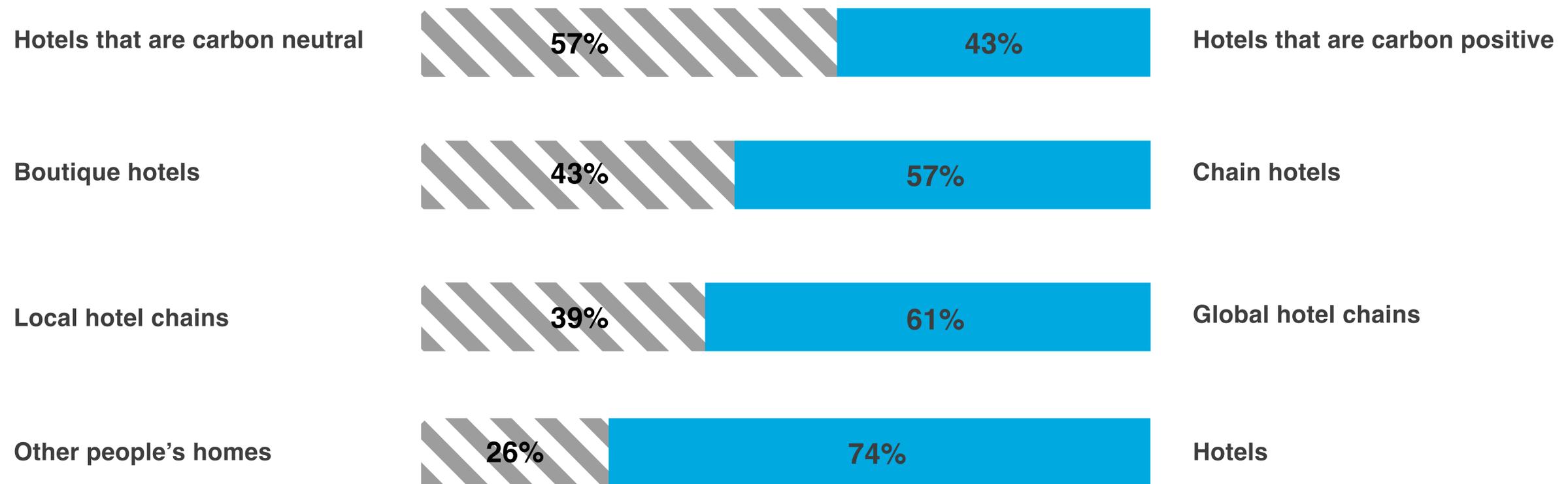
This creates the following traveler truth: In 2033, the accommodation status quo will remain. But new accommodation forms will have notable momentum.

<sup>14</sup> Diana Britton, The Loss Aversion Coefficient, 2015



## Accommodation in 2033: status quo vs. emerging forms

% of travelers stating they'd prefer to stay in either **an emerging form of accommodation** or a **status quo form of accommodation** in 2033



**PAYMENT**

# Fighting familiarity bias

The future forces around payment methods center on those which are appearing today. Cryptocurrency.

Subscription models. Facial recognition payment systems. However, these payment methods must negotiate the human trait of familiarity bias (our tendency to stick to what we know) for people to adopt them.

The fact that in 2033, only 41% of travelers will feel 'very comfortable' paying for a trip via PayPal (launched in 2000), reveals the familiarity bias's relevance to payment methods.

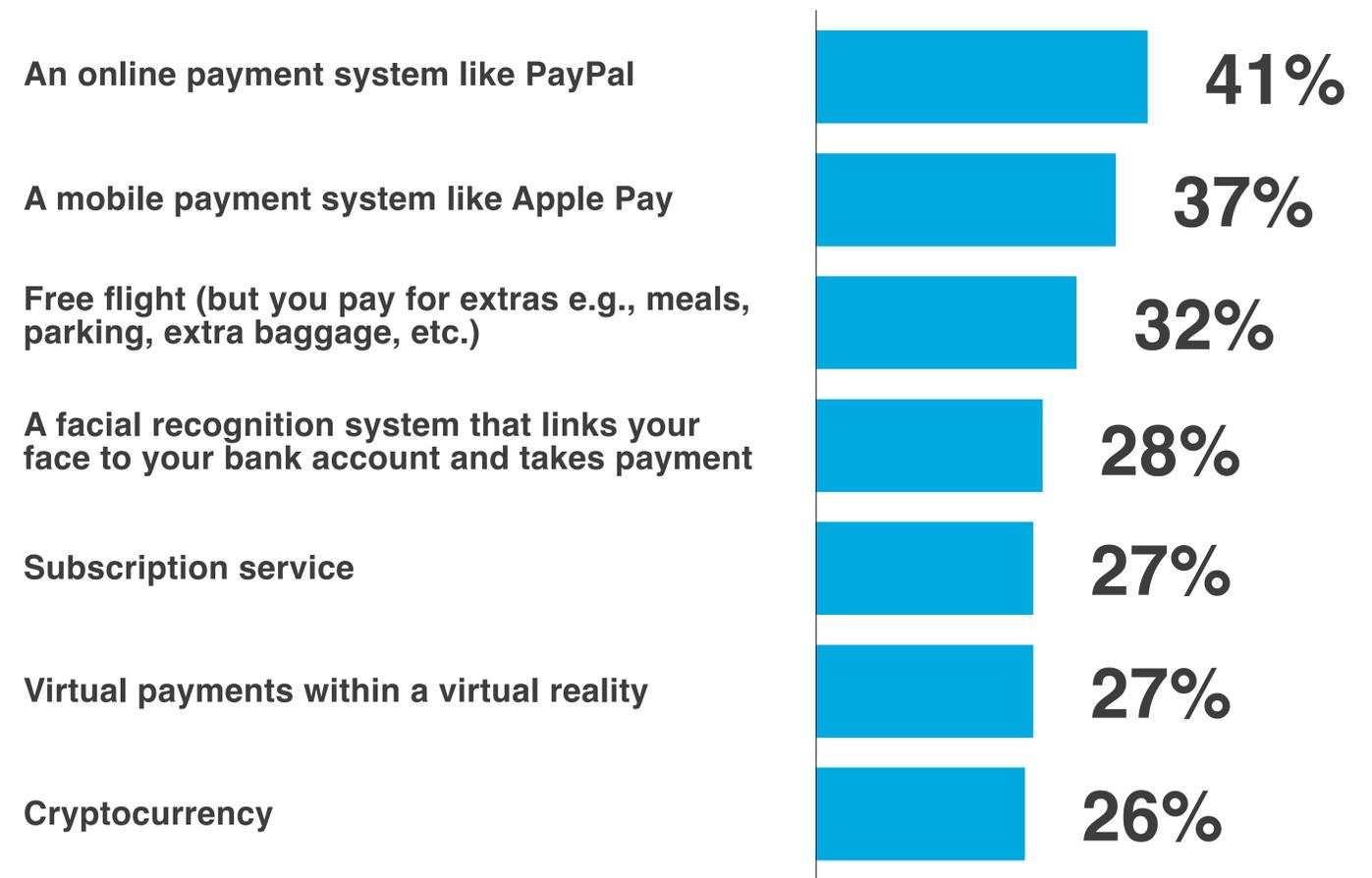
Emerging forms of payment will still need time to build familiarity before travelers are comfortable using them.

This is because with familiarity comes trust. And with trust comes the comfort to use new payment methods openly for others to see.

And once people see others behaving in a certain way, they're likely to also behave like that (social proof).

## Payment for trips in 2033

% of travelers stating they'd be very comfortable using payment format to pay for trips in 2033





## MEMORIES

# Metaverse = memory-verse

The future forces of innovation in VR, Augmented Reality (AR), and the Metaverse mean travelers will be able to create more vivid memories in 2033. This resonates perfectly with a deep traveler trait of wanting to make memories. Among various motivators for traveling, “making memories” is three times more important to travelers than either the people they meet or the mode of transport they use. Therefore, in 2033, AR and VR will be travelers’ preferred way of remembering trips: 54% claim that they would prefer using these new technologies as memory aids to using physical photos or social media content.

## TRAVELER TENSIONS

# Is this human reaction going to be universal and consistent?

It’s wrong to assume that nearly two billion travelers will react to 2033’s future forces in

the same way. Likewise, it’s wrong to assume that these forces will prompt two billion unique reactions<sup>15</sup>. That’s why the travel sector has historically grouped travelers together. However, the time has come to evolve how we do this.

## The historical grouping methods

Whether people travel for “business or leisure” doesn’t define who they are or what they do on their trip. Yes, their trip’s core purpose might explain their travel behavior to some extent. Yet it doesn’t entirely explain why they make travel-related decisions.

Or how they think about the future.

Demographic grouping has similar limitations, as we’ve seen via comparisons of different age groups’ motivations for traveling.

Where people live—their cultural context—goes further in explaining their behavior. Hofstede’s cultural index demonstrates how varied cultural values are (e.g., that the UK is twice as likely to foster virtues of long-term rewards – instead of short-term gains – compared to the US).

<sup>15</sup> This number reflects how many travelers the 10,345 sample for our survey represents (1.947bn travelers)

## The evolved grouping methods of 2033

To understand travel in 2033, we must move away from defining groups by the simplest possible parameters. We must use Traveler Tribes instead of general customer segments, or demographic brackets. We’ve done this before in 2006 and 2015. In doing so we identified electronic traveler identification, biometrics, ‘super apps’, social media and smart technologies as key drivers of transformation.

But what are Tribes? Tribes define themselves by shared ideologies. Connected ways of thinking. Common attitudes. And identifying Traveler Tribes will allow us to better understand, and prepare for, travel in 2033.

But how do we decide what ideology, ways of thinking, and attitudes will form 2033’s Traveler Tribes? Our proposal is to create Traveler Tribes based on their shared attitudes to the future forces that will affect travel in 2033, and on their shared human traits, which will drive their behavior. Shared attitudes and shared human traits both have a unique value in understanding future traveler behavior. Shared attitudes toward the future will foreshadow how they will react

## TRAVELER TRIBES 2033

to 2033's reality. Shared human traits, which influence how we make decisions, are timeless. For example, Muzafer Sherif created the concept of social proof—the idea that we copy others' actions—in 1935.

<sup>16</sup> Today, e-commerce is dominated by the 5-star review concept, which employs the very same thinking.

### TRAVELER TRIBES

## Who are 2033's Traveler Tribes?

To create 2033's Traveler Tribes, we assessed 215 attitudinal and human traits on which Traveler Tribes could be based. Then, having analyzed 1.15 million data points, we created 43 potential sets of Traveler Tribes.

Of these, we found four Traveler Tribes that were truly distinct: whose distinctiveness is largely explained by their attitudes towards 2033's future forces and human traits, not by factors like cultural differences and age.

Let's understand 2033's Traveler Tribes further. We will do this by learning:

**Who they are today** – so we can spot them and see their evolution between 2023 and 2033

**How they think** – to learn the reasons behind their future behavior

**Their outlook on travel in 2033** – to find out how we deliver on their aspirations and quell their concerns

**How they will travel in 2033** – to uncover their unique traveler journeys

**Meet their members** – to understand the lives of people within 2033's Traveler Tribes and how Traveler Tribes are brought to life in different parts of the world

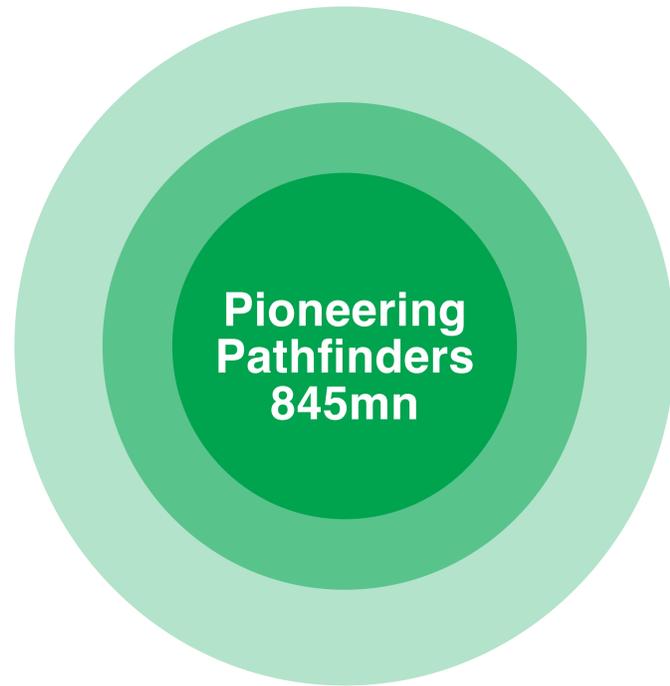


Understanding our Traveler Tribes in these areas will help us learn about not only what excites and concerns them but also what the travel sector's relationship with them should be in 2033. Should it be a relationship of support, helping them navigate travel's new reality?

Or one of partnership, acting as messengers to endorse the sector's new ways of working? Let's review and understand our Traveler Tribes one by one, then evaluate the relationship we should have with them.

<sup>16</sup> Muzafer Sherif, A Study in Some Factors of Social Perception, 1935

A VIEW OF THE  
**Traveler  
Tribes  
2033**

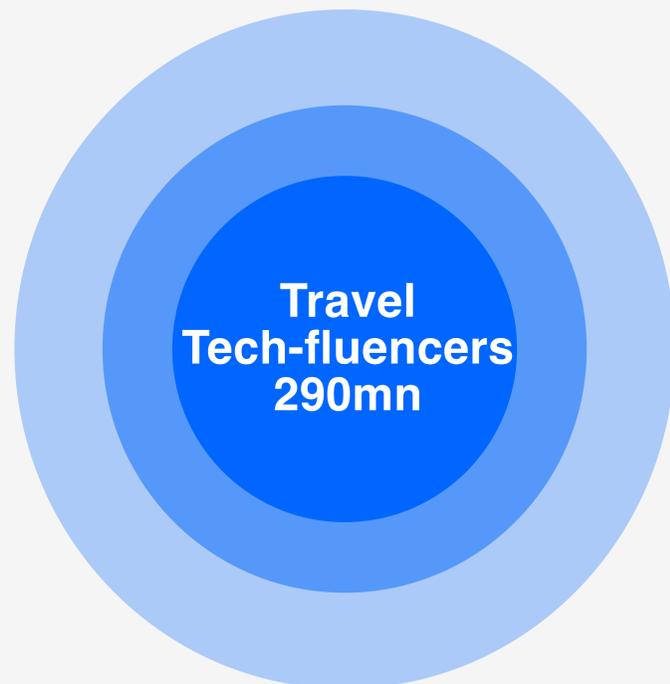


Excited about  
travel in 2033

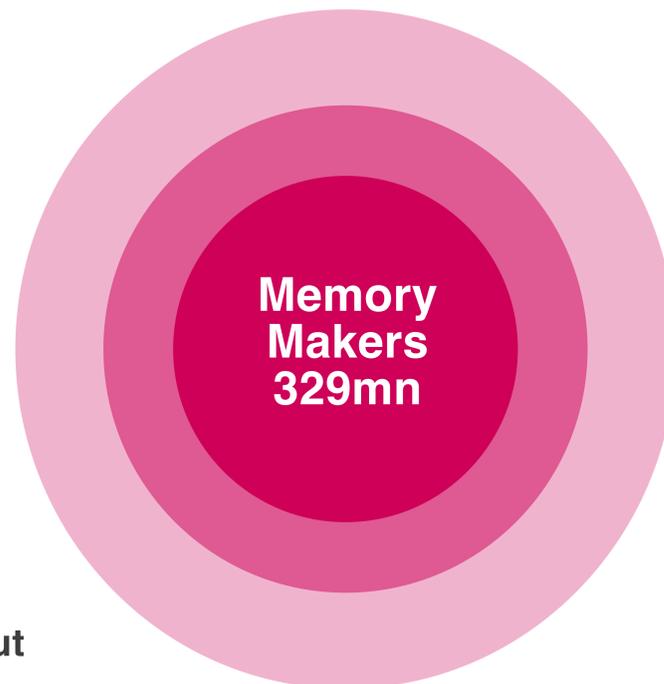


Need the travel  
sector's support  
in 2033 (to help  
navigate travel's  
new reality)

The travel sector  
needs their support  
in 2033 (as a  
messenger to endorse  
travel's new reality)



Concerned about  
travel in 2033

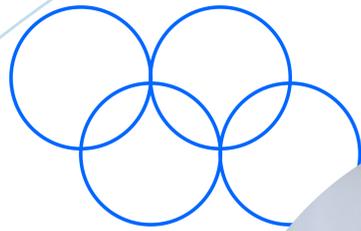


amadeus

# TRAVELER TRIBES 2033

The % of travelers  
that are in each  
Traveler Tribe

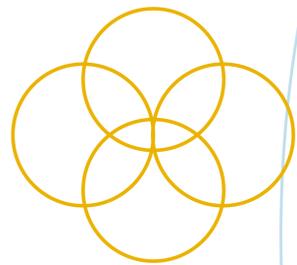
**15%**  
Travel  
Tech-fluencers



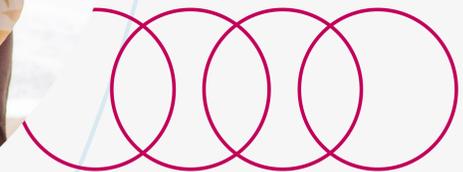
**43%**  
Pioneering  
Pathfinders



**25%**  
Excited  
Experientialists

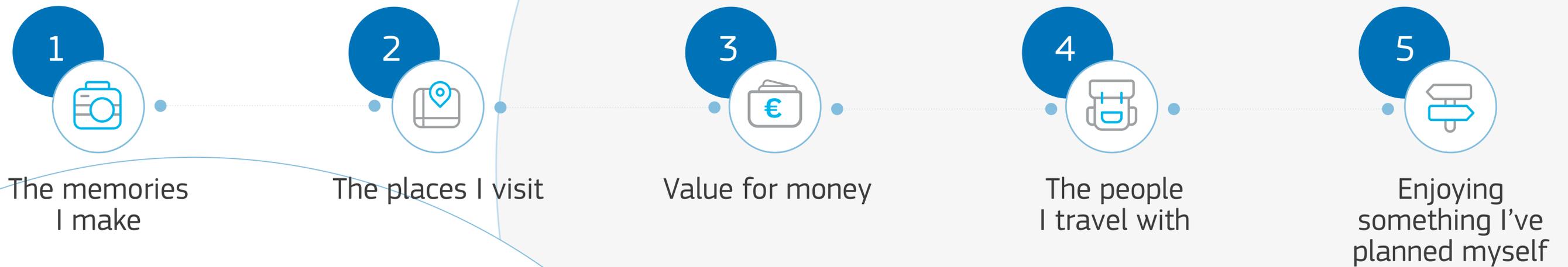


**17%**  
Memory  
Makers



# The 5 most important considerations for travelers

(from a list of 10)



# The 5 things that excite travelers most about trips in 2033

(% listing as one of the top three things which excite them most about trips in 2033, from a list of 9)

- 44%** That traveling to trip destinations will be quicker
- 36%** To be able to remember trips in more vivid ways
- 35%** The chance to travel in more environmentally friendly ways
- 34%** That technology could reduce problems during trips
- 34%** Different ways of paying for trips will make trips more affordable



# The technologies which will most interest travelers in 2033

- 1 Being able to pay for trips by cryptocurrency, in a virtual reality or via facial recognition
- 2 Using data to create relevant trips
- 3 Biometric data - to allow you quick access through passport control
- 4 Apps which have everything I need to plan my travel
- 5 Virtual reality preview tours

# The 5 things that concern travelers most about trips in 2033

(% listing as one of the top three things which concern them most about trips in 2033, from a list of 9)

- 44%** Cybersecurity attacks will be more frequent in 2033
- 41%** How safe the data people share will be
- 36%** Travel in 2033 will be unaffordable
- 36%** Political instability will mean it's not possible to travel to some destinations
- 34%** That my travel trips will be more expensive if I want to be more environmentally conscious

## METHODOLOGY

Data is based on an online survey conducted by Northstar Research Partners in August 2022 with 10,345 travelers from 15 countries (Australia, China, France, Germany, India, Indonesia, Japan, Mexico, New Zealand, Singapore, Spain, Thailand, UAE, UK and US) who are likely to travel internationally in the next 3 years and have traveled internationally at least once in the last year





Meet the  
**Excited  
Experientialists**

TODAY

# Carefree & experience heavy in 2023

The Excited Experientialists have a “try it and see” approach to life. 44% of this Traveler Tribe don’t live with children. The absence of commitment allows them to explore the world. They can afford to do this because 45% have a mid- to high- income and often have jobs which provide flexible working options.

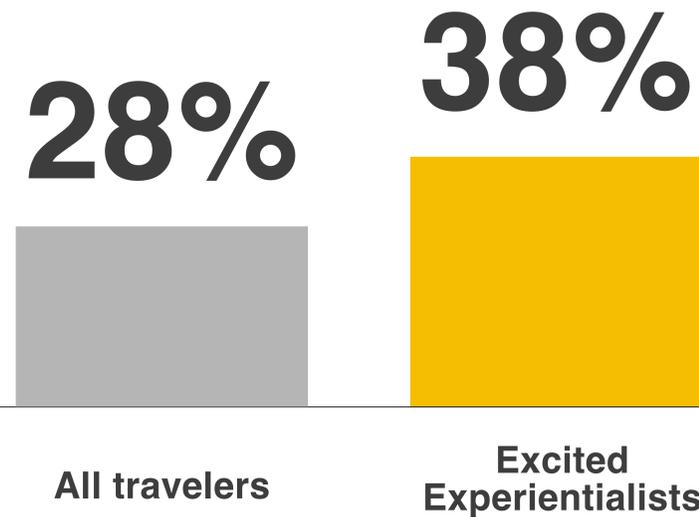
This allows the Excited Experientialists to try out new experiences. For example, in 2022, 23% changed jobs, 29% started learning a new language and 34% did volunteer work. This reflects a preference for experiences over materialism. Therefore, their awareness of most modern technologies doesn’t translate into vast ownership of gadgets like VR headsets (compared to other Traveler Tribes). It’s also why they’ve traveled 38% more than other travelers in the last year.

THEIR THINKING

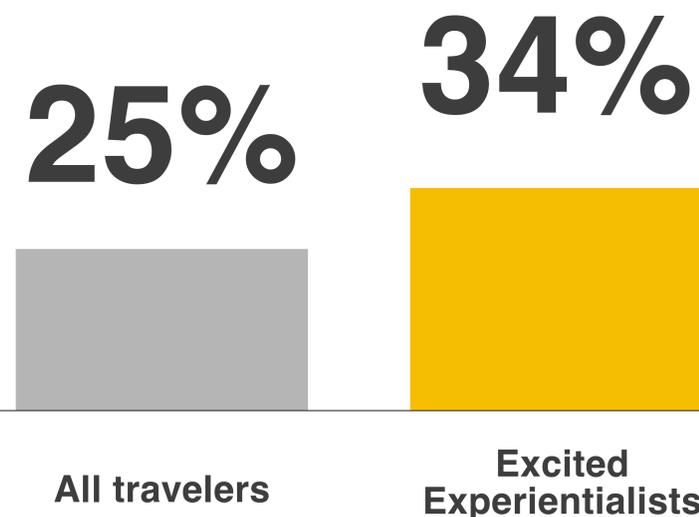
You only live once, or you’ll lose out

## An instinctive & impulsive mindset

% stating they make decisions on instinct instead of information



% stating they like to be impulsive instead of always having a plan



The Excited Experientialists are part of the YOLO (you only live once) movement. Living in the moment is part of who they are. That's why they're more likely than other travelers to act on instinct rather than to do research before making a decision.

Why? Because information constrains their thinking. Conversely, 46% are open to ambiguity, which is 44% more than other Traveler Tribes. This is because ambiguity and the unknown excite them. They are 45% more likely than other travelers to consider negative impacts on their health and well-being as a secondary factor in decision-making.

Travel for our Excited Experientialists is centered around seeking release from monotony. They're instinctive thrill seekers who balk at routine.



“ I know it sounds really cliché, but we're here once in this life. ”

YOLO. Excited Experientialist

#### THEIR OUTLOOK

## Unsure but excited

Excited Experientialists don't have a favored way for travel to develop in 2033. They're open to limitless possibilities which would at least be interesting or at best, exciting!

Because they're not future-focused, the Excited

“I'm not going to classify it as 'it's going to be good; it's going to be bad.' It's going to be interesting.”

Excited Experientialist

Experientialists are unsure of what the future holds and how different it will be. 23% of them think that travel in 2033 will be vastly different from today, while 51% think it'll be similar. When shown what travel in 2033 could be like, 51% are excited about the possibilities.

# The Excited Experientialists' 2033 traveler experience

## THE PURPOSE

Open-minded  
and exploratory

The Excited Experientialists will be keeping their 2033 travel options open. They prefer the freedom this offers compared to committed travel plans. To them, commitment doesn't equal excitement.

Compared to other travelers, they're less open to exploring travel in 2033 using a third party

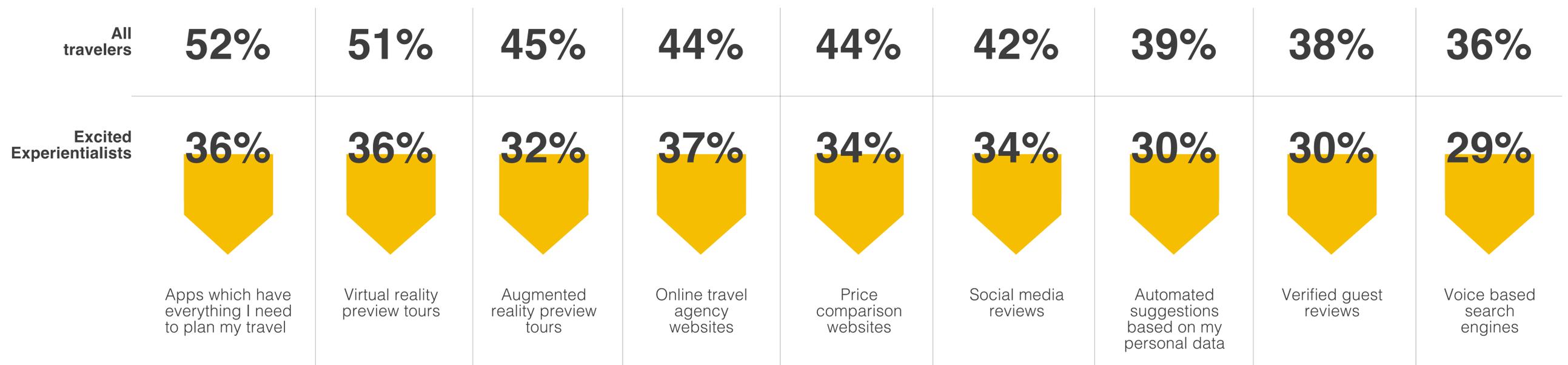
such as an online travel agent. This is because they say predictability removes excitement. Only 50% will share personal data with online travel agencies, who can plan trips based on earlier experiences or find new ones.

This differs to other travelers who are less comfortable with ambiguity. Excited Experientialists are more instinctive.

## PLANNING

### 2033's anti-planner

% likelihood planning tool will be used by all travelers and the Excited Experientialists in 2033 compared to other travelers



The Excited Experientialists' thirst for unpredictability means they're 2033's anti-planners. They will have 25% fewer planning touchpoints compared to other travelers. Some would even prefer to avoid the planning process completely.

While they're less likely than other travelers to trust technology for travel planning, they're confident that it'll save them time. They know that creating the perfect trip means spending some time organizing and that using AI to help with this will allow them to get on with the fun part of traveling.

But there's a downside to this. Using AI for trip planning comes with the risk of making trips more predictable. This removes the possibility of impromptu experiences and decreases excitement!

## TRANSPORTATION

### The need for speed

An experimental mindset means that the Excited Experientialists are open to any new mode of transportation. But their view of the service experience is more focused. In 2033, they expect their time in transit to be an enjoyable experience rather than a logistics process.

Every part of transit is to be about enjoyment and comfort. That's why the mode of transportation is 21% more important to them than other travelers.

This means their key transportation question in 2033 will be: what gets me to my destination as fast and as comfortably as possible? That's why the prospect of swifter travel to destinations is what excites them most about travel in 2033. They want to be where the fun is – fast. And this is where they want AI to help them.

The Excited Experientialists are skeptical of AI as a planning tool. But they know its potential to speed up their airport experience. In 2033, the Excited Experientialists expect airports to use AI to help them get from the airport entrance to their end destination quickly. How? Speedy security. Nifty navigation. With human help only being used as a backup.

**“ What are the tasks that take most of your time at the airport? ”**

You're trying to find your way to the gate, then you end up standing in this long queue of security ”

Excited Experientialist

While speed matters, sustainability matters less. 33% of Excited Experientialists (who think biofueled flights will be the best way to travel sustainably in 2033) believe biofueled flights should cost less than a jet fueled flight. But that's not to say that they dismiss the notion of sustainable travel entirely. 39% of them think the best way to travel sustainably is to support a limit on how many miles of international travel people are allowed. The Excited Experientialist is more open to this idea than any other Traveler Tribe. This reflects their awareness that they travel too much. Or is it that when they travel, they want to do so in a carefree way?

## ACCOMMODATION

### The excitement economy

In 2033, the Excited Experientialist will look for less predictable and more exciting accommodation experiences. They're the Traveler Tribe least likely to prefer global hotel chains over local brands, non-catered accommodation over catered accommodation and private homes over hotels in their search for unpredictable experiences.

This is reflected further in what they expect from

eco-hotels. The Excited Experientialists are the Traveler Tribe most comfortable for ecohotels to not provide them with accommodation essentials in the search to try something new. 30% will use the same towels/sheets if staying under a week, 27% will have showers limited to 5 minutes in length and 17% are happy to fore go elevators.

## PAYMENT

# In need of a substitute for subscription

Excited Experientialists' "here and now" mindset means that 31% are concerned about subscription services to pay for travel in 2033. However, this isn't due to unfamiliarity since 41% of the group uses them now. It's because subscriptions mean predictability, which ties you down and curtails the ability to act instinctively.

For Excited Experientialists, new forms of payment should reduce admin time and allow them to get on with the fun side of traveling. Anything that gets in the way of enjoying their traveling experience to is avoided as much as possible.

That's the Excited Experientialists: Instinctive. Impulsive. They know they only live once, so why waste time planning? Let's find out by hearing from two of them in more detail.



## THE EXCITED EXPERIENTIALISTS

# Meet their members

The Excited Experientialists want to seek out new experiences. They're driven by instinct. And have a YOLO philosophy. But that comes to life differently based on factors such as where they live and their life stage. To understand this more, let's meet two of them to understand who they are in more depth.

## Hanna, 22, Germany

### EXCITED BUT RESERVED

I'm more comfortable with the future of travel than I am excited. That's because European culture means I'm more reserved compared to my excitable counterparts. I'm comfortable because I know that the future of travel means I'll have a better travel experience. All you need to do is look at how travel has improved while I've been alive to see the progress.

I can remember (just about!) going away with my family aged 12 and mobile boarding passes not existing. Now they're the norm. In 2033 I envisage 'flying' through airports without having to queue. With no delays. And being on the plane to get to where the fun of traveling REALLY happens ASAP.

That's not to say being in transit isn't fun. It is when you travel in a comfortable and enjoyable environment. From start to finish. I value this comfort as my daily life is so hectic, I rarely get breathing space. Hunting for the next big thing is tiring!



## Ricardo, 31, Mexico

### EXCITED TO THE MAX

I'm the most excited of the Experientialists! I only have one chance to see the world. And I'm excited that technology will reduce travel time and maximize the time I have, to do what I want. I emphasize "I" as in 2033 I'll be doing what I want, not what an algorithm suggests I should do.

I welcome anything that can help me with the admin side of my trip so I can get to where the adventure is, as long as it doesn't constrain me. I'm an excited experientialist after all. I like to keep my options open.

That's why I'll go anywhere from Croatia to India. Travel for me is about getting out there and meeting new people. And making once-in-a-lifetime memories to share with friends and family in the process.

That's not to say I like to plunge into the complete unknown. I still like to have a loose plan so I can make the most out of my trip, but it needs to give me freedom.

That's why I travel at least four times a year: routine irks me – #YOLO.

# Meet the **Memory Makers**



TODAY

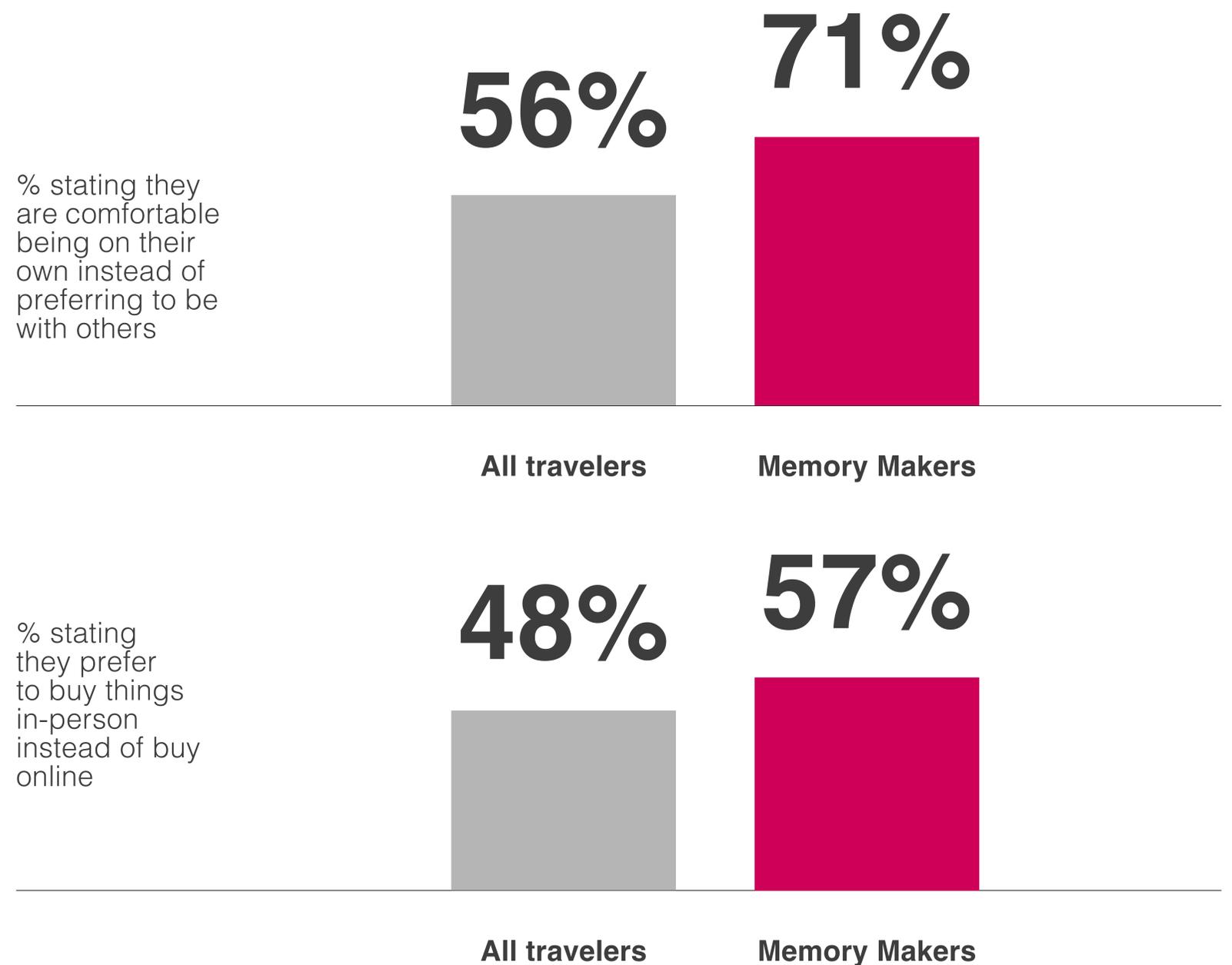
# Habitual and happy in 2023

44% of Memory Makers are aged 42 or older. This means they're habitual, indicated by a 70% preference for familiar technologies over 30% preference for new and emerging ones. This extends into their experience as well.

They're less likely to have changed jobs or sought out new vocational skills in the past year (compared to other Traveler Tribes) and have low to medium income levels.

It also reinforces their preference for habit, and they're 24% more loss averse than other travelers. This means the future is a daunting prospect for them.

## The psychology of the Memory Makers



“ I’m not really into technology and gadgets. But I have the essentials, what I need for myself.”

Memory Maker

#### THEIR THINKING

**People first.  
Planet second.  
Technology???**

Memory Makers are comfortable with themselves, and 71% are comfortable being on their own. But that’s not to say they don’t like being with other people. Whom they travel with is 16% more important to them than it is to other Traveler Tribes.

While the Memory Makers put people first, they place less emphasis on the planet and technology. 57% of them say that sustainability doesn’t dictate the decisions they make (compared to 43% saying it does).

“ I don’t think like I’ve ever significantly inconvenienced myself for the sake of the planet.”

Memory Maker

They’re equally uncomfortable with technology encroaching on their lives. They perceive it to be a replacement for the human mind and something that devalues human connections.

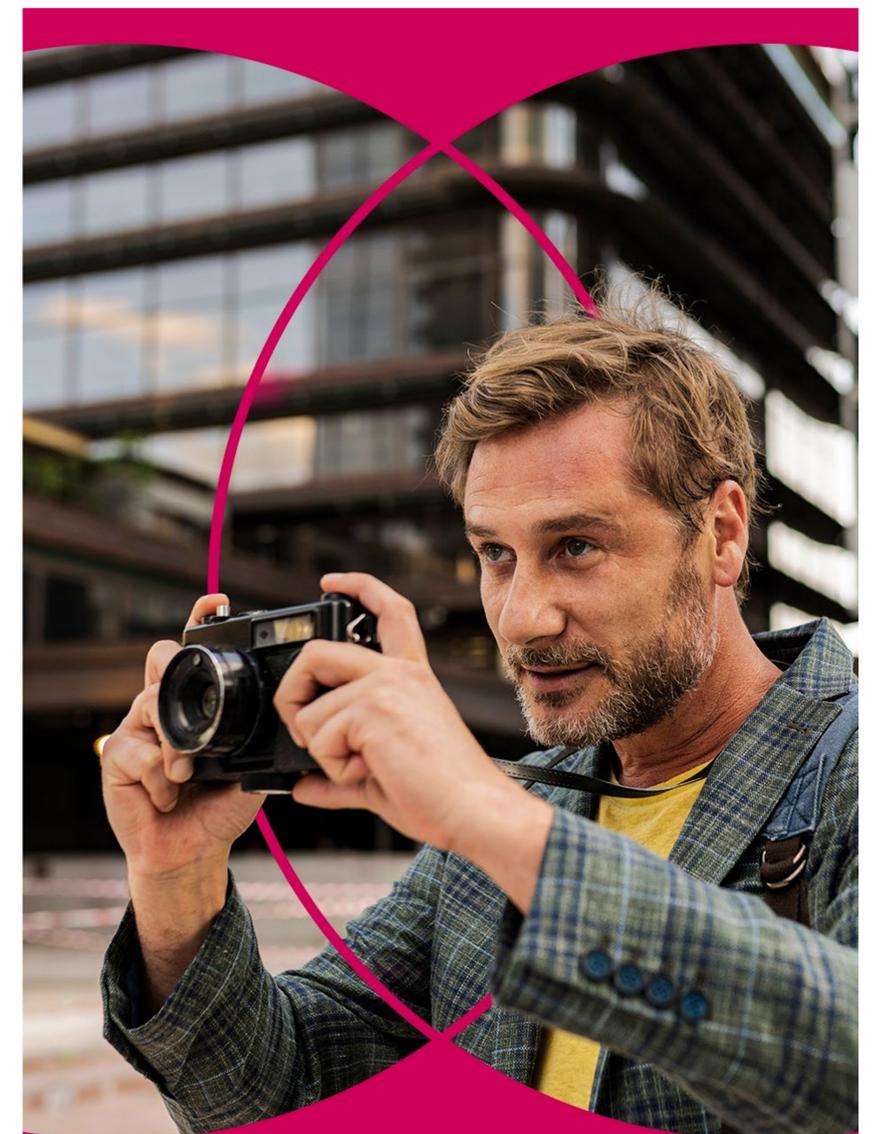
“ I feel like technology is replacing human beings. Initially, it was hard labor, now it’s replacing our minds and even our interpersonal connections, which is upsetting.”

Memory Maker

#### THEIR OUTLOOK

**live in the moment or stuck in the moment?**

The Memory Makers live in the moment. But in a very different way compared to the Excited Experientialists. They actively avoid change, and 41% think travel in 2033 will be similar or the same as it is today. When shown how much travel could change, they were unpleasantly surprised. Whereas 58% have no positive emotions toward travel in 2033, 56% are concerned about it. And while they’ll still travel in 2033, they’re likely to travel less than they do now if their concerns aren’t managed.



“ Artificial intelligence and virtual reality. Both of those will have a place in future travel. I don't know that it's necessarily for the better though. ”

Memory Maker

What's behind this disapproval? Their simple travel needs are to visit nice places and to make memories there. Their lack of engagement with technology and disregard for sustainability makes the Memory Maker intimidated by the future of travel.

## The Memory Makers' 2033 travel experience

### THE PURPOSE

## Simple & valuable

Memory Makers' motivations for travel will simply be to make memories and visit places. Making memories are 15% more important to them than other travelers, and the places they

visit are 16% more important to them than other travelers. That's why 40% of Memory Makers are most excited by the prospect of being able to remember trips more vividly in 2033.

Their simple purpose, combined with their income levels, will mean that value for money will be 13% more important to them than other Traveler Tribes. This also means that 38% are most excited by the prospect of travel becoming more affordable in 2033.

### THE PLANNING

## The p-AI-ns of technology

The Memory Makers distrust technology and will be less likely than other travelers to trust AI when planning their trip. This is because they're less trusting of organizations using their personal data than other Traveler Tribes. As a result, only 35% of them want leisure travel to be largely planned by AI in 2033.

“ I think we keep sort of battling, giving up more information. And I feel like it's a one-sided equation that we don't understand. ”

Memory Maker

They're particularly mistrustful when it comes to emerging forms of data and new ways of using personal information. Only 36% will share facial recognition data with transportation providers, and only 36% will share their calendars with Online Travel Agencies to suggest trips.

However, they appreciate recommendations. Travel for this group is about making memories, so anything that guides them to a destination where they can make new memories is welcomed.

“ If there's something AI knows I would enjoy, I'd check it out, but otherwise, you just want to walk through the streets and find a quaint little shop. ”

Memory Maker

Despite their skepticism about technology, the Memory Makers are excited about VR and AR preview tours. 57% of them will use VR tours before purchasing a trip. Given their low income and aversion to loss, justifying value for money is key. The chance to immerse themselves is a further benefit.

They'd also like to see websites – not apps –

which allow them to book everything in one place. They avoid switching between different or unfamiliar platforms because they're not tech-savvy.

## TRANSPORT

# AI is inevitable. But not incredible

Memory Makers see transportation as a means to an end. The way they travel is 33% less important to them than it is to other travelers. In 2033, the prospect of arriving at their destination faster is the most exciting part of travel for 53% of them. This excites them more than other travelers and reflects their desire for simplicity and to get to the places where memories are made. Sustainability doesn't influence their travel plans in any significant way. They place responsibility on large corporations to manage climate change, rather than on individuals. And certainly not on themselves.

The Memory Makers will question technology's role in 2033's airport. But they'll accept automation. And know that digital processes and AI will make things more efficient. However, they're unsure how this will change their experience. A more automated travel experience is seen as an inbound inevitability rather than an incredible innovation.

“ So even now there are cubicles with officers checking you, but there are also spaces where you just scan your passport. We never go to that one even though we're curious, we go to the real person. I mean, it's nice, it's easy, but we're not choosing it. ”

Memory Maker

## ACCOMMODATION

# Preferring memory makers over data demands

The Memory Makers are likely to be traveling in 2033 to improve their well-being while working remotely.

This will mean they're more likely to prefer:  
1) rural over urban accommodations and  
2) local hotel chains over global chains compared to other Traveler Tribes.

These preferences will exist because the Memory Makers know that lesser-known accommodation forms can create better memories. Conversely,

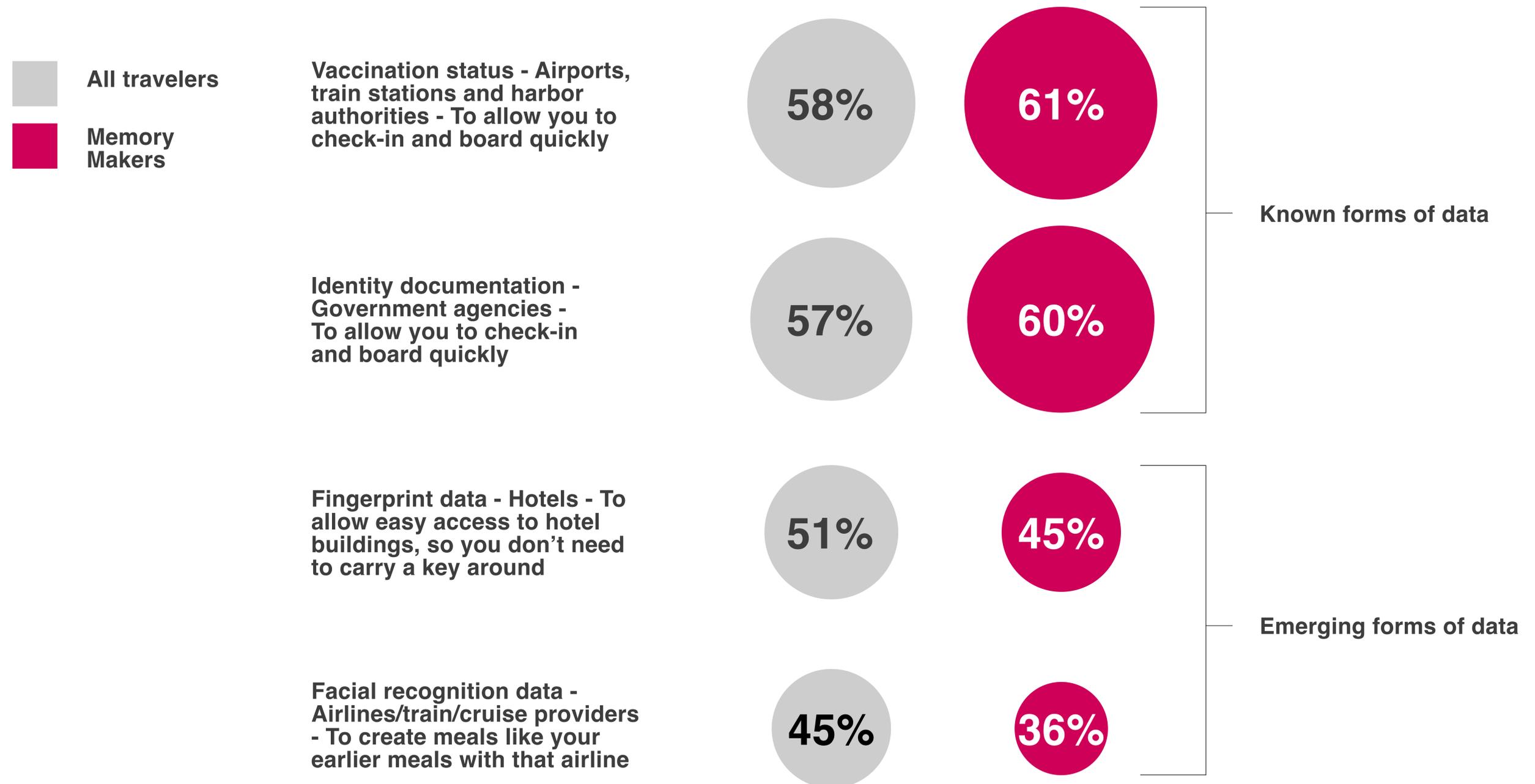
they know that larger hotel chains will rely heavily on technology.

This won't resonate well with them, as less than half of them will be willing to share fingerprint data to gain access to their accommodations or to personalize their stay.

They will also be reluctant to share more intrusive forms of data (like biometric and facial recognition information) although they're as likely as other travelers to share data forms with which they are already familiar.

## The Memory Maker's view on data

% stating they're willing to share data in the given context in 2033



## PAYMENTS

# Privacy problems & a potential promise

The Memory Makers' low engagement with technology means that they'll be less comfortable than other Traveler Tribes with using cryptocurrency and facial recognition payment in 2033. They still won't be familiar with the technology and will be concerned about the invasion of privacy and oversharing of their personal data.

“There's a limit to how much privacy I want to surrender and which data I'm willing to share.”

Memory Maker

But all isn't lost. New payment methods will excite the Memory Makers if they make travel affordable. This will resonate with them because of the importance they place on value.

But the combination of the promise of cheaper

prices and unfamiliar technology will create further concerns about the plausibility of such payments. That's the Memory Makers: cautious and conservative, but with glimmers of hope that

they'll be more open to the incoming changes to travel. These glimmers of hope can be seen by looking at two of their members in more detail.



## THE MEMORY MAKERS

# Meet their members

The Memory Makers want to make memories and visit places. They're unconvinced that travel's future in 2033 will excite them. But by looking at the two ends of their tribal spectrum – those most and least positive about travel in 2033, we can see the aforementioned glimmer of hope.

## **Nick, 27, Thailand**

### UNCOMFORTABLE BUT NOT CLOSED TO CHANGE

I know change is coming. And change is uncomfortable – too many unknowns are disconcerting. Inertia is my default setting. But that's not to say change can't be good. Especially when it comes to travel. For example, as much as I prefer things I'm familiar with, I'm not going to miss the chance to create better travel memories with VR technology, for example, if that becomes possible. I live for today, not the future.

But the fact is, in 2033, some technology will be my reality. Another example of this is new ways of paying for things. I'm not keen on using things like cryptocurrency currently. But if in 2033 everyone else is using it, I'll likely follow suit.

Especially if using new ways of paying for travel makes it more affordable. Because, to be honest, the cost of travel currently is a big worry for me, and as a freelancer it's not like I have money to burn. So, you could say I'm quite pragmatic. While the thought of this unknown technology is instinctively quite daunting, if it removes barriers to making happy memories, I can get on board.



## **Antoine, 47, France**

### INWARD AND SLIGHTLY PESSIMISTIC

In my mind technology has become too intrusive already. Why do we want to allow it to play an even bigger role in our lives? Especially when it comes to travel. For me travel is about the people you travel with and the places you visit. I'm not what you'd call a risk taker, but I like learning about history and culture. I rarely travel solo (but I'm comfortable enough with my own company to do so). And I like trips where I can see four or five places in one go – maximum memories and great value! It's this combination of people and places which help you create long-lasting memories that you can look back upon for moments of instant happiness. But I do understand that there's some technology that can make the travel experience better for me.

I'm sure technology can help reduce delays and capture special moments when I'm traveling. Does that mean I'm comfortable using it? Not necessarily. My own memory is more reliable than VR. And why should I trust AI to plan a trip that'll be memorable and give me what I want? But as much as it worries and frustrates me, part of me knows I should accept that further technological intrusion on travel IS happening. For better or for worse.



# Meet the **Travel Tech-fluencers**

**TODAY**

# From business travelers in 2023 to the future mindful balancers

The Travel Tech-fluencers are today's young business travelers. Of this group, 48% are under the age of 32, and three quarters of them travel for business meetings. They've a moderate income but are confident it'll increase. Why?

Because they're looking out for opportunity, and they have a forward-facing perspective on life. They hope

this will propel their careers and income upwards.

Their progressive perspective on life is symbolized by how much technology they own (like VR headsets) to their use of cryptocurrency. But the Travel Tech-fluencers don't buy technology just for the sake of buying it. 73% own a wellness app, which reflects a recent

change in their lifestyles in the last year (2022). These changes include starting a new sport (56%) and donating money to charity (57%).

This shows that the Travel Tech-fluencers' progressive perspective has caused them to start thinking about how they can best care for themselves and others sooner rather than later in their lives.

**THEIR THINKING**

## The Travel Tech-fluencers' two sides

On the surface, the Travel Tech-fluencers are confident go-getters, but beneath the surface there's a different story with two sides:

<sup>17</sup> Travelers are defined as being open to variable rewards if they're more likely to sign-up to a hotel reward scheme that gives them a free night in either a 2-star or 4-star hotel (chosen randomly) for every 10 nights they book than a hotel reward scheme that gives them a free night in a 3-star hotel for every 10 nights they book.

### Unerring uncertainty

40% say they aren't afraid of risk. Their adoption of new technologies suggests this but compared to other travelers they're less open to variable rewards<sup>17</sup>. Of the Traveler Tribe, 70% are averse to ambiguity. Additionally, 81% like to have a plan (rather than act on instinct) to the extent that they say in their own words "we need to be in control", which is a common sign of anxiousness and uncertainty.

### Sparing sustainability

82% of the Travel Tech-fluencers claim that sustainability dictates their decisions. That is until sustainability inconveniences them by having to invest significant amount of their own time and money to be sustainable. They go as far as to say:

"carbon is increasing and harming the environment. A bad environment is bad for us."

Both sides of the Travel Tech-fluencers are evident in their view of traveling in 2033.

THEIR OUTLOOK

## Torn about technology

“ We see a total overhaul of travel in 2033. And technology will aid this. ”

Travel Tech-fluencer

53% of Travel Tech-fluencers' think travel in 2033 will be different than it is today. This provokes two feelings. Their inner, confident go-getter is excited. But the unerring uncertainty that concerns the Travel Tech-fluencers means that 54% of them have both positive and negative emotions about travel in 2033. Their mixed feelings about 2033's technology cause this angst, as demonstrated by the things that both excite and concern them most about travel in 2033.

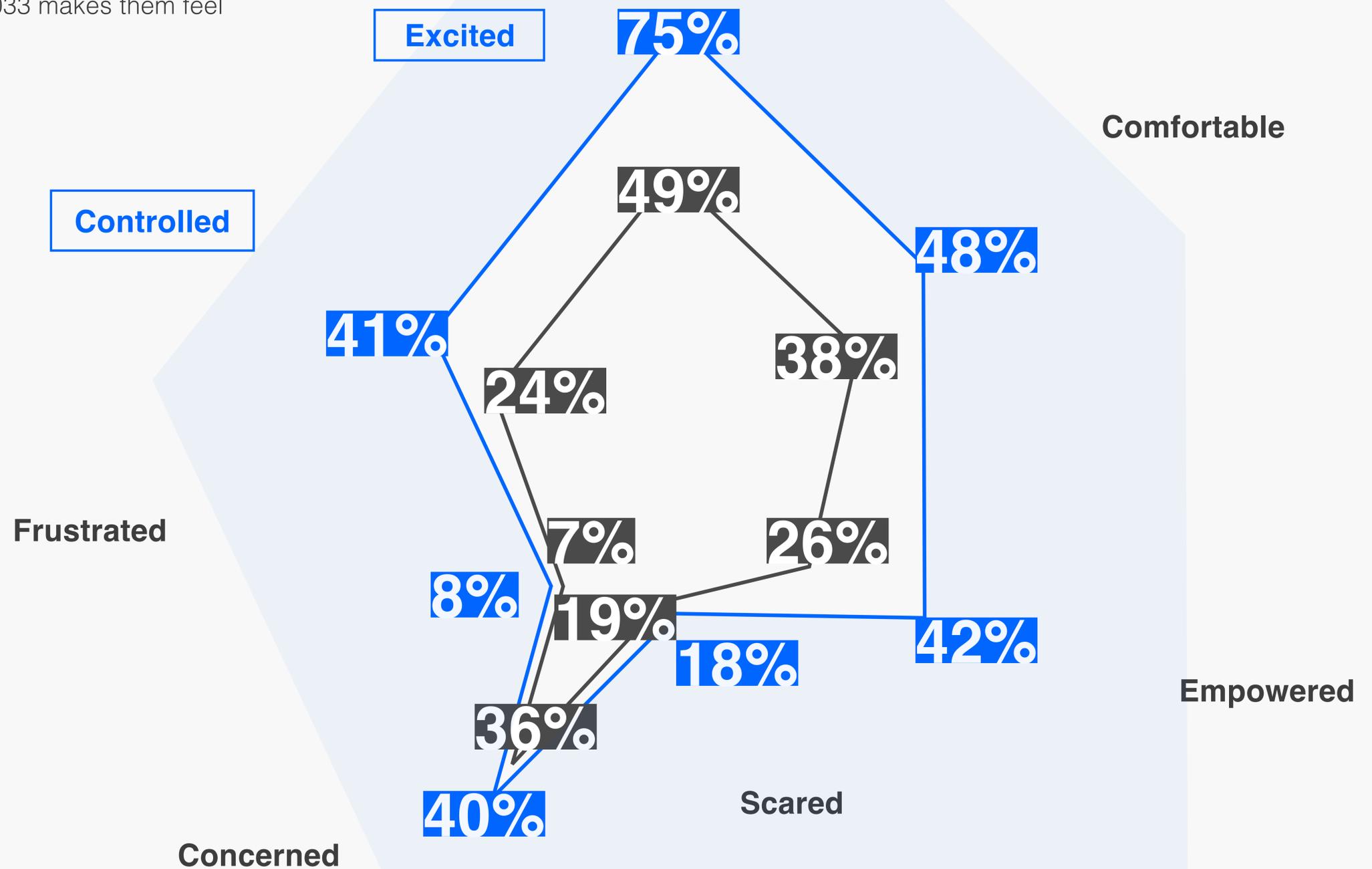
The avid, planning Travel Tech-fluencers are excited that AI will make planning travel in 2033



# The Travel Tech-fluencers' two-sided view of 2033

% stating how travel in 2033 makes them feel

- All travelers
- Travel Tech-fluencers



faster and reduce problems. But – more than any other travelers – they fear the risk of cyber-attacks and are concerned about their data's safety.

## The Travel Tech-fluencers 2033 travel experience

### THEIR PURPOSE

new and novel trumps tried and tested

In 2033, the Travel Tech-fluencers will define themselves by what they're less likely to do. They're less likely to be traveling for business or to see friends (compared to other types of trips they are making). Instead, they're more likely to be riding the wave of new forms of travel, which will include doing different things and having unique experiences. It reflects their preference for the new and novel vs. the tried and tested.

### PLANNING

Polarization prevails

The two sides of the avid planning Travel Tech-fluencers resurface in how they will plan travel

in 2033. On one hand, 87% will trust AI to plan all elements of their trip. 75% will use VR preview tours, and 75% will use super apps. But the Travel Tech-fluencers couple this with the concern and uncertainty they have about having a different travel reality.

Why will they be the most likely Traveler Tribe to still use a high street travel agency in 2033? Why will 68% of them still use social media reviews? And why will they prefer using AI to plan their work trips rather than their personal trips? Because as avid planners, they crave control. And they aren't as willing to relinquish that control to technology as their confident exterior suggests.

### TRANSPORT

Automated airports required. Sparing sustainability resurfaces

The Travel Tech-fluencers – like all travelers – will remain loyal airplane users in 2033. But their expectations about air travel will increase. They expect VR or AR navigational aids to assist them in airports as part of a streamlined travel experience. They want airports to be defined by automation and having large numbers of airport staff will be a signal that technology has stalled.

But their usage of air travel once again highlights

how they view sustainability. For example, the Travel Tech-fluencers are prepared to pay more for biofueled flights. However, often this won't be at a cost to themselves given the higher probability that they'll be traveling for business (compared to other Traveler Tribes). And while 25% of the Travel Tech-fluencers think using virtual meetings rather than traveling for in-person meetings will be the best method for sustainability in 2033, 72% of these Travel Tech-fluencers will switch to in-person meetings if virtual attendance slowed their career down, 71% would change their minds if doing so increased productivity. Additionally, 59% would change to an in-person meeting if their manager were in attendance.



## ACCOMMODATION

# Status quo accommodation and personalization

The Travel Tech-fluencers claim to want authentic accommodation options, where they can experience life “like a local.” But again, their outward confidence won’t translate into new behaviors. In 2033, the Travel Tech-fluencers’ accommodation habits will stay the same.

But while the Travel Tech-fluencers will continue to stay in global hotel chains, they expect these chains to share their progressive mindset. 68% are willing to supply fingerprint data to allow easy room access and to have their room configured in a personalized way.

The Travel Tech-fluencers show some sustainability sensitivities in their method of travel. But less when it comes to where they’ll be staying. They are no more likely than other travelers to prefer carbon-neutral over carbon-positive hotels. And they’re less likely than other travelers to value elements of an eco-hotel that involve self-sacrifice like reusing towels and sheets for short stays and having a five-minute time limit for showers.



## PAYMENT

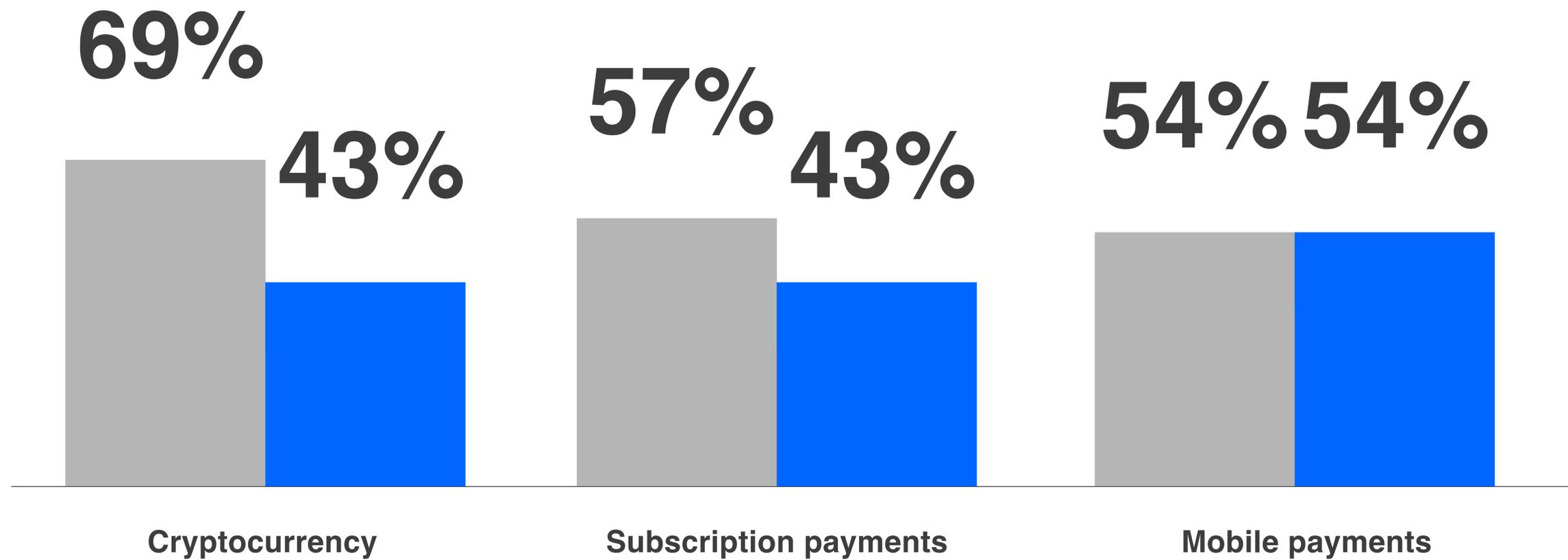
# Currency, confidence and (dis?) comfort

The Travel Tech-fluencers are ahead of the curve when it comes to using cryptocurrency (69% own currently) and subscription payments (57% currently use). This means that in 2033 they’ll be more comfortable paying for travel using these methods than most. But their outward confidence is again questionable.

In 2033, the Travel Tech-fluencers will still be using PayPal and Apple Pay instead of other emerging payment methods. Why? Their data security concerns play a role. Or are they only concerned about using technology to make large payments? This would explain why 54% have used a mobile payment system in 2022 but only 54% will feel very comfortable paying for a trip using the same method in 2033?

That’s the Travel Tech-fluencers: progressive and confident on the surface. But quietly cautious inside. With technology always on the mind. The business and leisure travelers in the Tribe both have the same psychological aspirations and fears about travel in 2033. But they have different views on technology’s role within it. To find out more, let’s hear from two of them.

## The Travel Tech-fluencers & polarizing payments



THE TRAVEL TECH-FLUENCERS

## Meet their members

### **Priya, 29, India, business traveler**

#### USES AI TO PLAN BUSINESS TRAVEL

I'm driven and ambitious. Traveling for me is an extension of that. It's either a way of finding new business opportunities or attending seminars. Or – if I'm lucky(!) – a reward for my hard work.

As a Type A personality, planning is important to me. Even though I don't find it a chore, I trust AI to make this part of my traveling life easier. In fact, it'll be the key factor in improving my travel experience. I'll still be traveling for business meetings then (although less than I do now), and I'll have a senior role in my company.

This will be great for my income. And will allow me to pursue even more of my aspirations.

But business travel will be a strain on my time and work-life balance – and my time will become even more valuable. Fortunately, AI will reduce the pressures of business travel by taking charge of my transport plans, no matter how big or small my journey is.



### **Anna, 41, Singapore, leisure traveler**

#### EXPECTS TECHNOLOGY TO SOLVE TRAVEL PROBLEMS

I see technology – AI and others – as a solution to the problems we face when travelling. In 2033 technology will improve even more.

I have high expectations for technology's role in travel. But my biggest request is a simple one: eradicate inconvenience.

Allow me to reach my destination and indulge in my true passion: discovery and exploration.

From AR preview tours to narrow down the choice, to a completely automated airport, nothing scares me off. Apart from threats to my data security.

I'd like to add a sense of balance to what is otherwise a hyper-technological travel experience. I strive for balance in every aspect of my life. Yes – I want to combine work and leisure.

But in the future, I'll be doing this less as I seek new and different travel experiences.



# Meet the Pioneering Pathfinders

TODAY

# Progressive in 2023 but **becoming more sensitive**

The Pioneering Pathfinders' life is now in full swing. 82% of this Traveler Tribe are between the ages of 23 and 41, and 68% live with their partners and children. Their above-average income lets them live a progressive, fast-paced life, always looking for their next big adventure. They're forward looking because over 50% own a VR headset, NFT, or smart speaker (much higher ownership compared to other Traveler Tribes). And they're

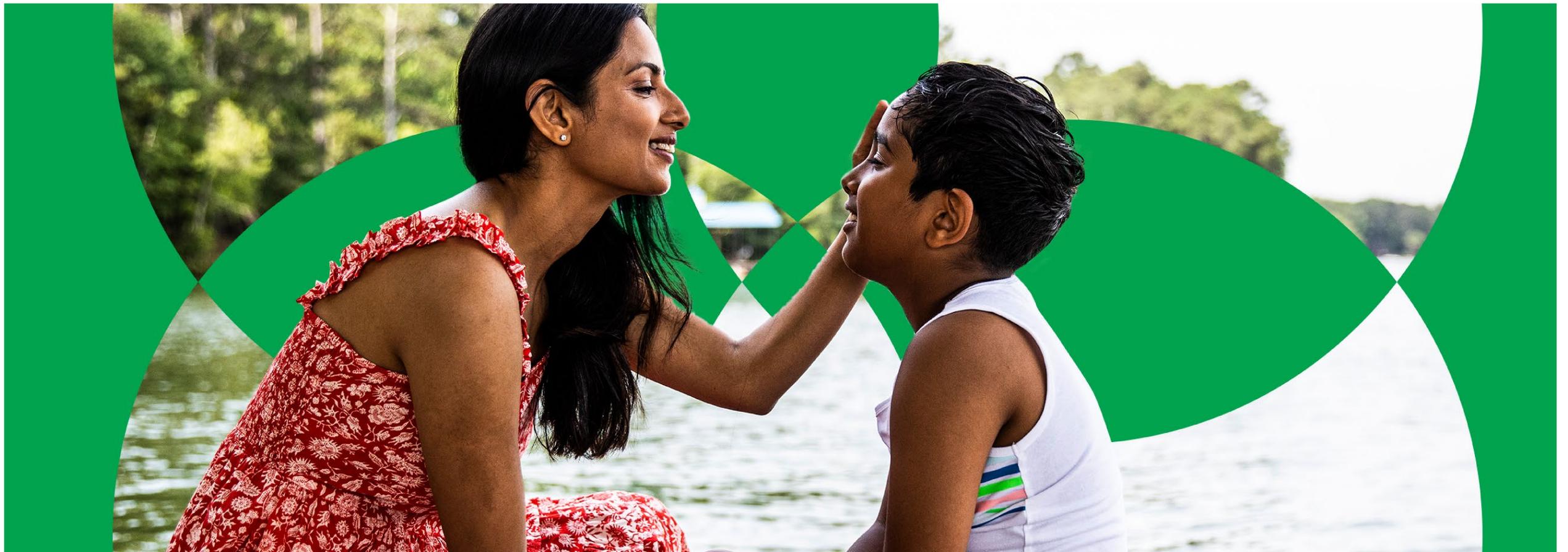
fast paced because they're open to calculated risk. That's why 43% have invested in stocks/shares and 65% own cryptocurrency.

Pioneering Pathfinders don't buy technology for show. They consider functionality too. For example, 68% own a smart fitness tracker. This is because they know they need to manage their fast-paced lives, especially with a family to care for. As a result, 79% say

that health and well-being dictate their decisions.

Despite their fast-paced lifestyle, the Pioneering Pathfinders have an emerging sensitive side. They care about the planet – already in 2023, 42% own an electric car.

And they're more likely than other Traveler Tribes to volunteer in their local community.



THEIR THINKING

# Informed risk takers. Sustainability superheroes

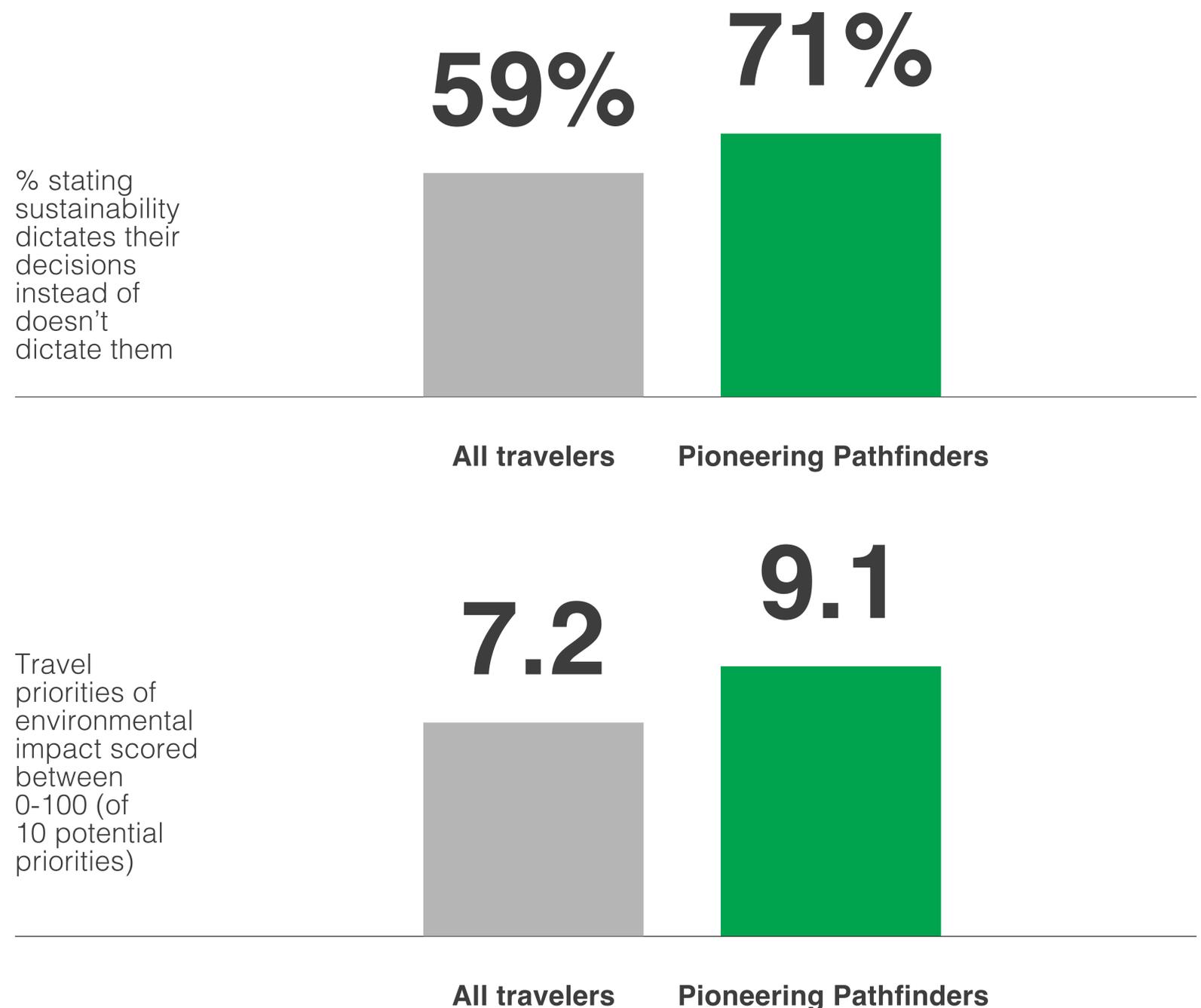
The Pioneering Pathfinders are less loss averse than other Traveler Tribes<sup>18</sup>. That's why they're more likely to say they're not afraid of risk and that they prefer new technology they're not aware of.

But they aren't reckless. 76% of the Pioneering Pathfinders like to have a plan. And 74% prefer to make decisions based on information vs. instinct. Their high income and openness to investing are evidence of this.

When not pioneering new technologies, the Pioneering Pathfinders focus their future thinking on sustainability. Sustainability is 20% more likely to dictate their decisions compared to other Traveler Tribes. Combined with their volunteer mindset and increased income, this results in the Pioneering Pathfinders being willing – and able – to pay more for airplane journeys powered by biofuel and carbon-negative accommodation compared to other travelers.

<sup>18</sup> Travelers are defined as being loss averse if they'd prefer a planning app that would make their trip 15 minutes slower if they didn't download it vs. a planning app that would make the trip 15 minutes faster if they did download it.

## Pioneering Pathfinders = Sustainability Superheros



## THEIR OUTLOOK ON TRAVEL IN 2033

# Delighted about difference

With a future-facing mindset, it's unsurprising that 42% of Pioneering Pathfinders think that trips in 2033 will be different from today. Upon learning how travel in 2033 will be different, 68% of the Pioneering Pathfinders are emotionally positive. They're excited. They're empowered. And they're comfortable. We shouldn't be surprised about this.

“ I feel that technology would play a big, positive role. I don't exactly have the picture of how it will, but I'm positive that it would erase health risk, human error, and make things better for travelers. ”

Pioneering Pathfinder

They're excited that technology can reduce problems when traveling, and they'll be early adopters of the technology that will do this. The Pioneering Pathfinders feel empowered by the chance to travel in more environmentally friendly

ways. Understandable, given they place 26% more importance on their travel's environmental impact compared to other travelers. And comfortable because they're ahead of the game – by already being aware of the technology that will shape travel in 2033.

But how will this mindset and outlook shape their traveler journey in 2033?

## THEIR PURPOSE

# Discovery. Discomfort. Disengagement.

In 2033, the Pioneering Pathfinders will travel more than they do now. Unsurprising as travel's future excites them so much.

But three forms of trips will define them in 2033. These are trips that the Pioneering Pathfinders are both: 1) most likely to do and 2) more likely to do vs. other travelers.

To discover new cultures and have unique experiences – 92% of Pioneering Pathfinders are more likely to travel for these reasons in 2033 than they are today. That's one-third more than other travelers

To get out of their comfort zone – 89% of Pioneering Pathfinders are more likely to travel to get out of their comfort zone in 2033 than they are today.

Again, this is a third higher than other travelers. This reflects that the Pioneering Pathfinders are less loss averse than other travelers and will take informed risks<sup>19</sup>

To improve health and well-being – in 2023, the Pioneering Pathfinders will be in the middle of their lives.

They know they need to manage their well-being more actively.

That's why they've started buying health trackers. But by 2033, their focus on well-being will mean 91% are likely to travel to focus on their health and well-being.

They'd go as far as to say: “my travel budget is part of my health and well-being budget.”

**PLANNING**

# Plain excited about planning

76% of Pioneering Pathfinders prefer having a plan to being impulsive, and they're tech-savvy. That's why 54% of them want AI to take a greater role than humans in planning leisure travel in 2033. This is because they trust AI to plan all aspects of travel.

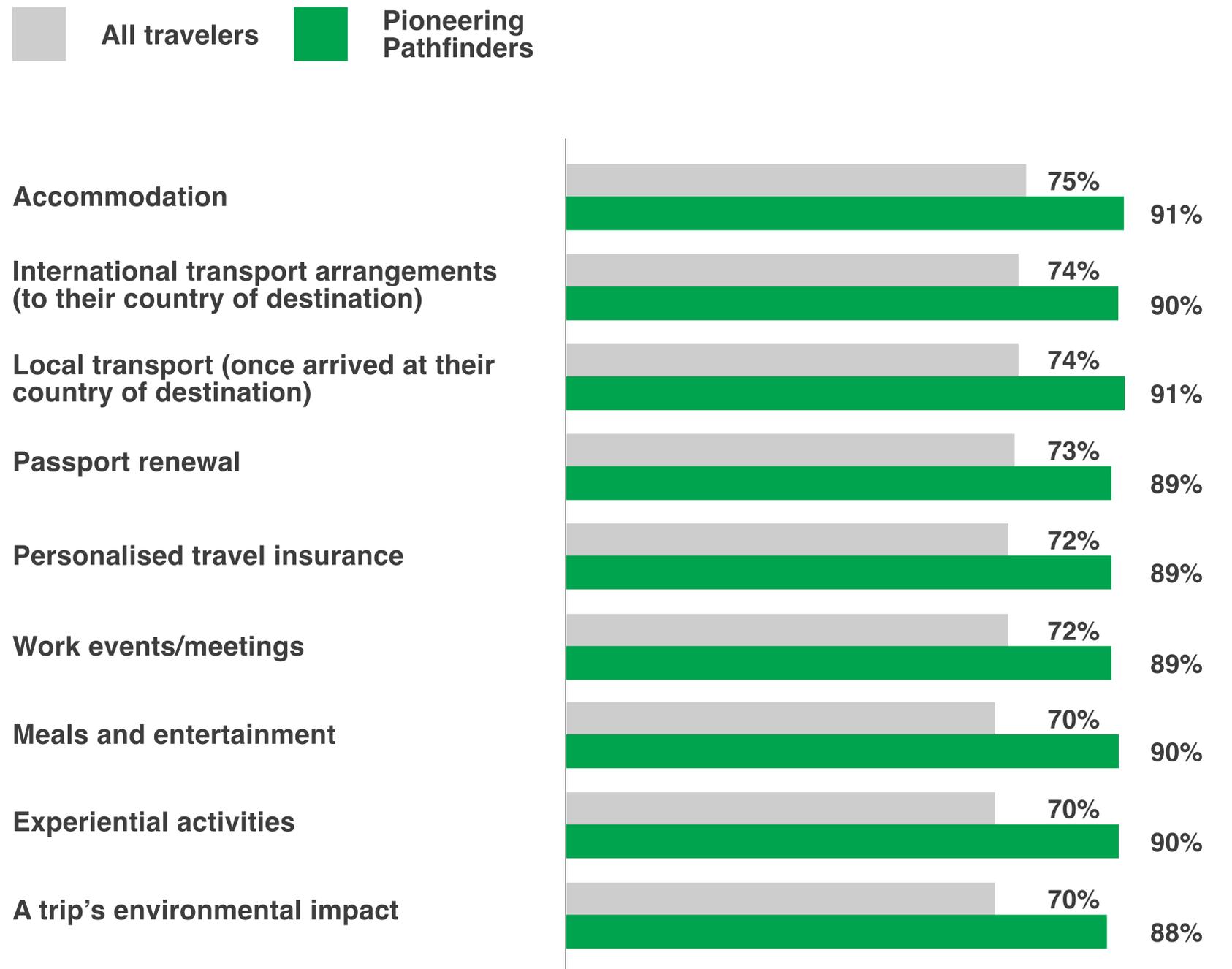
This matters for the Pioneering Pathfinders. Given their fast-paced lives they see AI-based planning as a time-saving tool. This trust in technology extends to trust in data. Over half of the Pioneering Pathfinders will share data about their earlier trips, medical history, and biometric profile with all relevant parties. From airlines to accommodation providers and healthcare providers.

This is because AI's ability to help plan travel is what most excites the Pioneering Pathfinders about travel in 2033. AI will help save them time. And it will reduce stress in their ongoing efforts to manage their well-being. But they also see the dangerous side of relying on technology such as data privacy risks and cybersecurity attacks.

<sup>19</sup> Travelers are defined as being loss averse if they'd prefer a planning app that would make their trip 15 minutes slower if they didn't download it vs. a planning app that would make the trip 15 minutes faster if they did download it.

## The Pioneering Pathfinders trust AI

% stating they trust AI to plan in 2033



## TRANSPORT

# The bio-high club

The chance to travel in a more environmentally friendly way is one of the most exciting prospects about travel in 2033 for the Pioneering Pathfinders.

They see airplane travel as being the most prevalent mode of long and short-distance transportation in 2033. But with a difference, in that 34% believe flights with biofuel will be the most prevalent way of traveling more sustainably in 2033.

The Pioneering Pathfinders show their status as 2033's sustainability superhero as 83% are willing to pay more for a biofueled flight than a jet fueled one (on average 46% more)<sup>20</sup>.

But the Pioneering Pathfinders see eco-friendlier plane travel as more than biofuel. They also consider what goes in the plane as well, and they aren't willing to accept more comfortable airline interiors if it comes at a cost to the planet.

That's why the Pioneering Pathfinders' pro-sustainability attitude and high income take them from sustainability sayers to doers.

<sup>20</sup> This is 83% of the 34% of Pioneering Pathfinders who believe that biofueled flights will be the most prevalent way of traveling sustainably in 2033

## ACCOMMODATION

# Big brands. Soulful songs. Receiving recommendations

The Pioneering Pathfinders' 2033 accommodation preferences reinforce what we know about them. 68% of them will prefer global hotel chains compared to 32% that prefer local hotel chains. This reflects the 69% who prefer buying bigger, well-known brands to smaller independent brands.

Within these hotels, the Pioneering Pathfinders will seek places that give them unique

experiences. From hearing their favorite song played as they enter their room to receiving experiential recommendations This extends to eco hotels where Pioneering Pathfinders expect sustainable accommodation to mirror their own sustainable behaviors. This means they're more likely than other Traveler Tribes to expect eco hotels to only serve organic food and only allow electronic cars in their car park.



## PAYMENT

# The future and the familiar

65% of the Pioneering Pathfinders already own cryptocurrency. It's not surprising that this means they will be very comfortable using all forms of alternative payment methods in 2033.

Compared to other travelers they're very comfortable paying for travel in cryptocurrency and within a virtual reality – products many of them own already in 2023.

That's the Pioneering Pathfinders: Half sustainability superheroes. Half technology trailblazers. The Traveler Tribe who'll make sustainable travel trendy and encourage others to embrace technology.

To understand these two elements of the Pioneering Pathfinders, let's speak to two of their members.

## THE PIONEERING PATHFINDER

# Meet their members

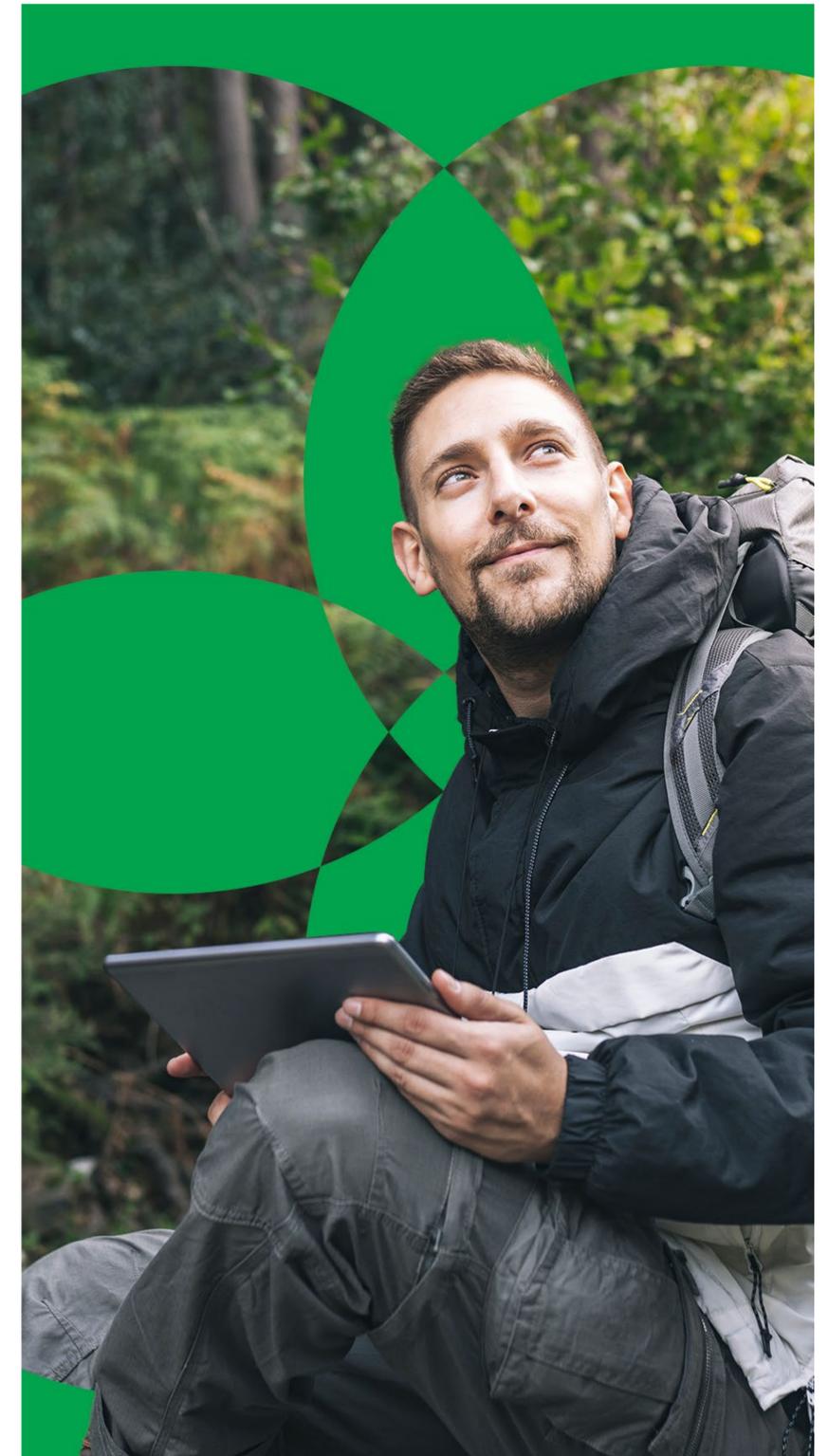
## Scott, 31, USA

### SUSTAINABILITY SUPERHERO

Sustainability is a hot and sensitive topic for me. Hot because I know I've a part to play – alongside others – in safeguarding our planet's future. Sensitive because traveling is a big part of my life. And while I want to experience everything the world has to offer;

I worry about my impact on the environment. It's something I've really started paying attention to, and I already make small changes where I can. I'll pay more for sustainable travel – like biofuel flights or electric cars. Or do virtual instead of physical meetings for work. I'm sure technology will be a key part of a more sustainable travel future. I've faith it'll help me – and everyone else – minimize the impact their travel has on the planet.

While technology will help, what people need to understand is that in the future not being conscious of sustainability will be a stain on your image. Being environmentally conscious is fashionable today. But tomorrow it'll be the status quo.



## Malee, 26, Thailand

### TECHNOLOGY AFICIONADO

Technology is going to continue to improve how smooth our travel experience is. I emphasize “continue” as technology has been doing this for a long time. I just don’t think everyone recognizes it!

My hope is that as technology keeps improving how we travel; people learn to trust it more like I do. People need to realize just how smart AI is already. But more importantly, how smart it’ll become.

It’s also vital that we acknowledge technology isn’t ONLY about efficiency. Technology is also a force for physical and environmental good. Just look at how technology is letting us be better managers of our own wellbeing. And travel more sustainably.

And yes, technology isn’t risk free. It’d be naïve to pretend things like cyber-crime and data breaches don’t exist. Because they do. But everything involves a risk. We just need to ensure the risks of using technology in travel are informed risks. They are currently. And I don’t think this will change!



TRAVELER TRIBES TOMORROW

# What should the relationship between the travel sector and our Traveler Tribes be?

THE EXCITED EXPERIENTIALISTS

## We need to tell them the future is fun

The Excited Experientialists' instinctive and open mindset gives the travel sector both fantastic opportunity and challenges. Opportunity because they're likely to show interest in future travel options. This means we will have the chance to win them over.

But their single-minded pursuit of excitement also gives us a great challenge. It means their evolution will be hard to predict. And that they're likely to eschew our efforts to help plan travel – viewing it as replacing excitement with predictability, that

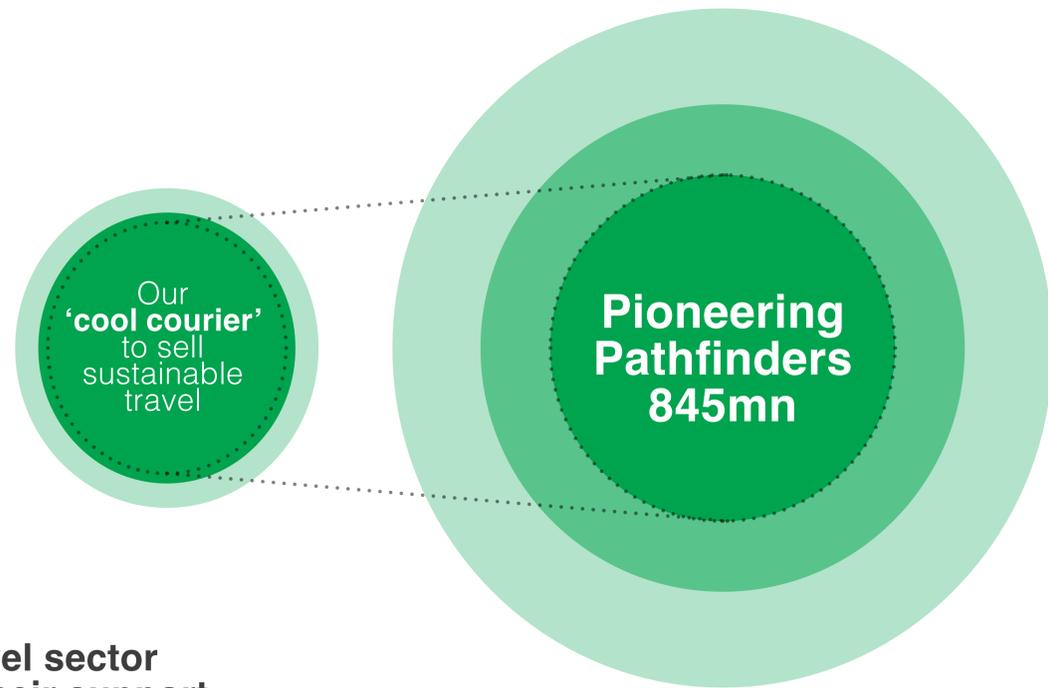
is, NOT a way to create a better trip experience.

That's why the Excited Experientialists need our support. They need educating about how travel innovations can offer a better experience without reducing the excitement they find in travel. That planning and predictability can be exciting. That you don't have to give up travel completely in order to travel sustainably. And that subscription services don't mean signing up to sameness.



OUR RELATIONSHIP

# with our Traveler Tribes

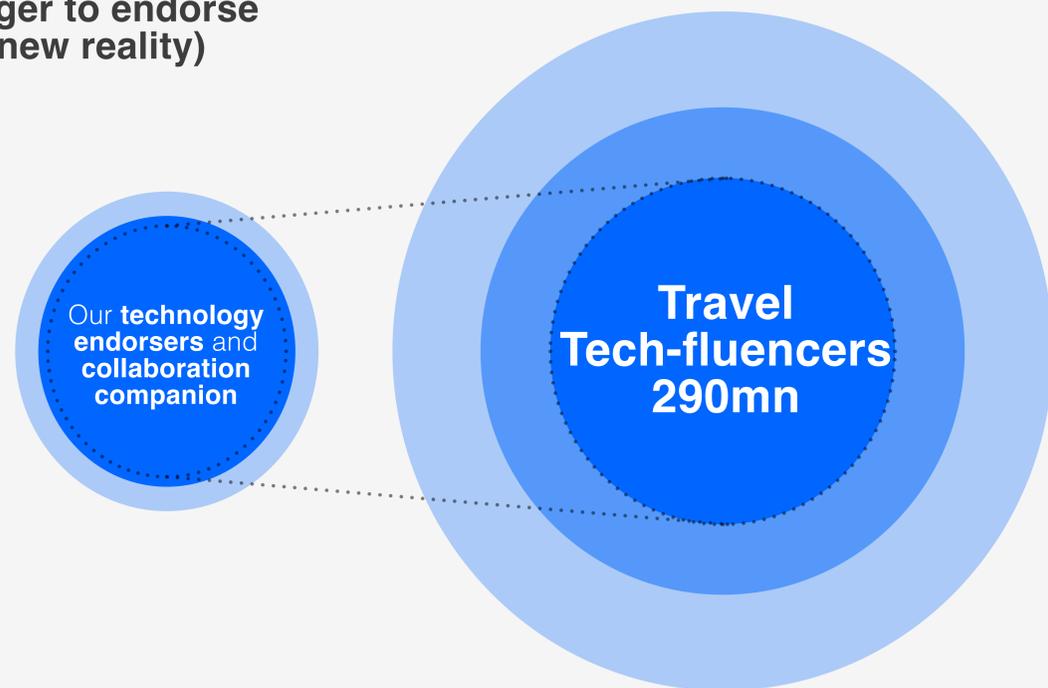


Excited about travel in 2033

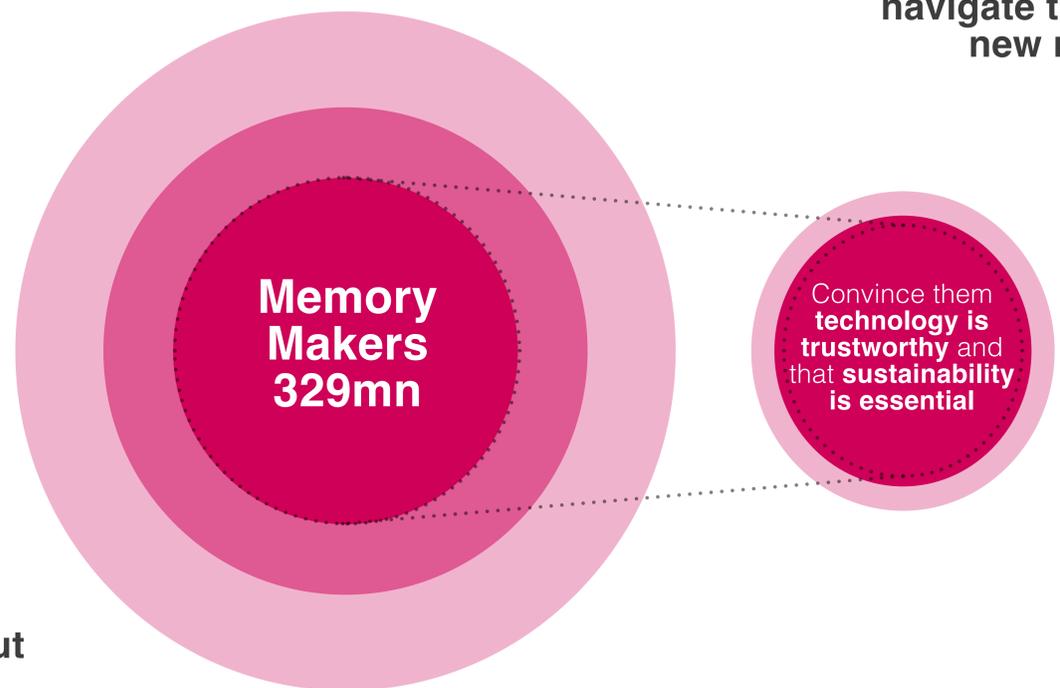


The travel sector needs their support in 2033 (as a messenger to endorse travel's new reality)

Need the travel sector's support in 2033 (to help navigate travel's new reality)



Concerned about travel in 2033



## THE MEMORY MAKERS

# The Traveler Tribe with whom we need to build trust

We believe the habit hardened Memory Makers are the Traveler Tribe which will challenge our sector the most. We need to persuade them that travel's future is positive for them. This means helping them trust technology. Showing them that sustainability matters. And that transport is more than a logistics process.

But the Memory Makers haven't totally closed their doors to us. They DO see some value in technology – for making memories and enabling better prices. And they're excited about getting to their destination faster.

Their disregard of sustainability will be more challenging for us to overcome. But if we can communicate the link between a healthy planet and memory making destinations, they may change their mind.

And while the Memory Makers need our support more than any other Traveler Tribe, we can lean on them to help us remember what travel is rooted in. People – not personalization. Making memories – not automating airports.



## THE TRAVEL TECH-FLUENCERS

# Our technology endorsers and collaboration companions

The Traveler Tribe with the highest proliferation of business travelers (compared to other Traveler Tribes) has a progressive mindset.

This means they have a role in endorsing travel's technological development. And will likely be its first adopters. This – combined with their

preference for novel ideas – means we need the Travel Tech-fluencers to lead the way in adopting the new technology we develop.

Yes, their conflicting views and uncertain perspectives mean they're not as confident as they suggest.

But this means they're a VITAL collaboration partner for us. They'll tell us the positive and negative sides of the future travel experience – what excites and concerns them.

And this will allow travel to evolve better than if those feeding back to us give solely positive or solely negative opinions.

## THE PIONEERING PATHFINDERS

# Our sustainability superheroes

By being open to calculated risk and sensitive to the world around them, the Pioneering Pathfinders have positioned themselves as a Traveler Tribe we need to cooperate with to spread the message about sustainable travel.

We need to partner with them not just because of their mindset, but because of their size. The best way to get people to adopt a new behavior is for them to see other people do it. And the Pioneering Pathfinders are a large crowd. And what they do is likely to encourage others to do the same.

The Pioneering Pathfinders' outlook on life outside of sustainability adds to their value as a messenger further. They're tech-savvy. Successful. Confident. This means they can promote sustainable travel in a way that's more akin to 'cool courier' than a 'moaning messenger.'



## To 2033... and beyond

Traveler Tribes 2033 has focused on travel's evolution and the Traveler Tribes within it until 2033. But what about the Traveler Tribes of 2043? Or 2053?

2033's Traveler Tribes will have a place beyond 2033. That's because they're partly based on deeply rooted human truths. Our inbuilt

neophilia and love of novelty (the Excited Experientialists). Our perception that losses outweigh equivalent gains (the Memory Makers). Our fear of ambiguity and love of control (Travel Tech-fluencers). And our openness to risk (the Pioneering Pathfinders).

But as the context around these Traveler Tribes changes, so too will they. They'll evolve. Disperse. Expand or shrink. And while we don't yet know how, based on what we know today, we can make an educated forecast about our Traveler Tribes' evolution.

# How will 2033's Traveler Tribes evolve?

## THE EXCITED EXPERIENTIALISTS

### Their evolving lifestyle

The majority of Excited Experientialists' pace of life will eventually slow down. Whether this be through following a set career path or starting a family. This will mean that they'll have to be more committed and more thoughtful.

### Their subsequent traveler trajectory style

They'll finally open their eyes to the importance of travel planning and adopt the necessary tools to plan travel. They'll likely be influenced by the Travel Tech-fluencers' promotion of technology's role in making travel better. Of course, this won't apply to all of them. And we can expect there to always be a die-hard faction of excitement-seekers traveling in search of impulsive fun.



## THE MEMORY MAKERS Their evolving lifestyle

The Memory Makers' habitual nature means that they are a Traveler Tribe that will eventually be at a crossroads.

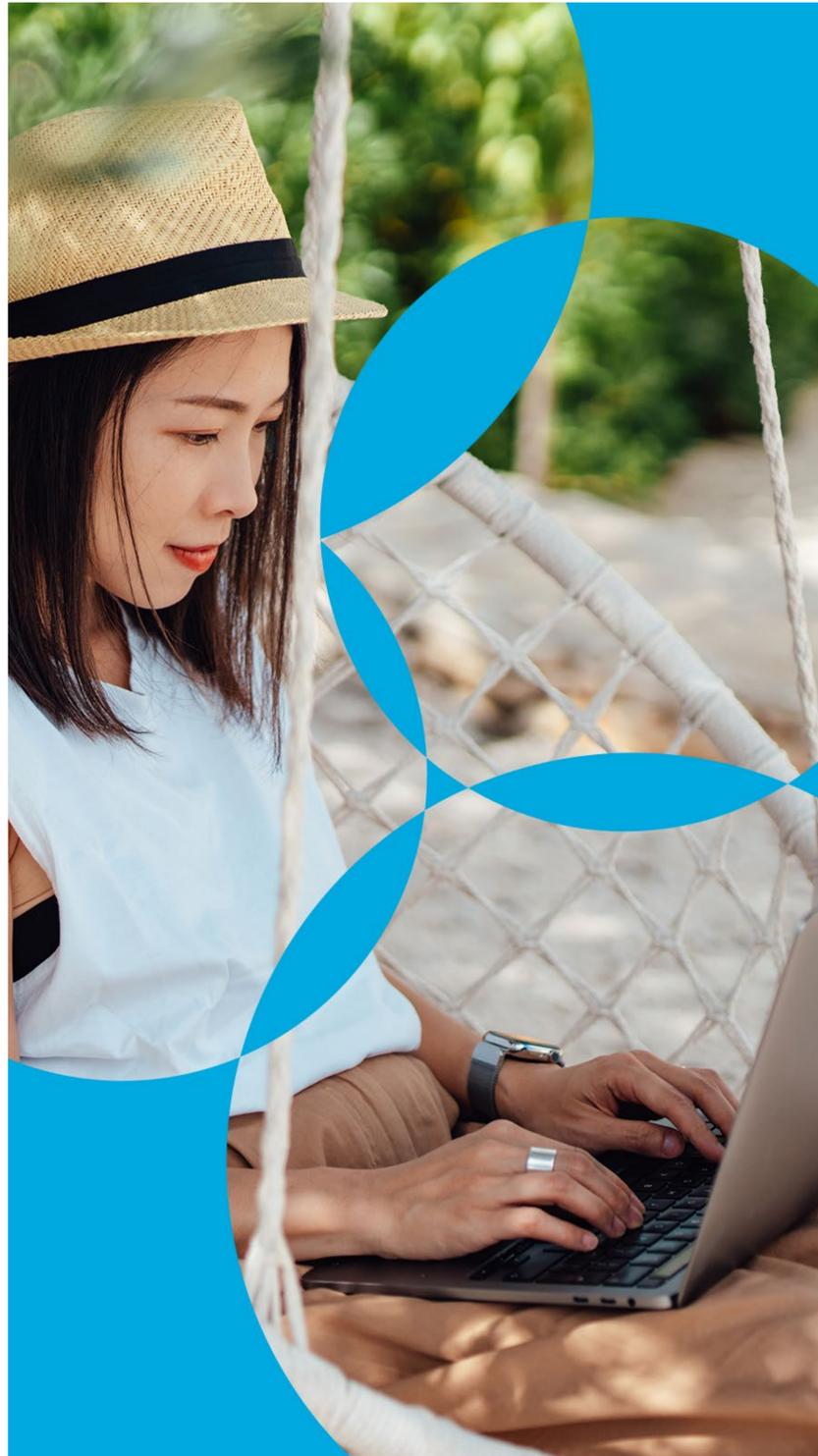
Here they'll split into those who stick to being habitual and skeptical about future technology.

And those who'll accept the inevitable and try new products, adopt new thinking, and become a late joiner to the Pioneering Pathfinder movement.

## Their subsequent traveler trajectory style

Reflecting on this, the remaining Memory Makers will be responsible for keeping the heritage travel industry alive.

For reminding people what travel is 'really' about (in their opinion). And in doing so, they'll risk not knowing how good a more modern way of travelling can be.



## THE TRAVEL TECH-FLUENCERS Their evolving lifestyle

The Travel Tech-fluencers' forward-looking mindset will mean that they'll evolve in-sync with the world around them. And this will always unite them.

However, they risk inner conflict with each other as sustainability becomes more important and their current approach to sustainability is frowned upon.

## Their subsequent traveler trajectory style

The Travel Tech-fluencers' importance to the travel sector will increase overtime as their value as a Traveler Tribe whose forward-looking views and balanced mindset becomes increasingly important.

## THE PIONEERING PATHFINDERS

# Their evolving lifestyle

The Pioneering Pathfinders will keep taking informed risks. And their role as the travel sector's sustainability superheroes will elevate their status.

As this status increases, the size of this Traveler Tribe will grow as travelers view them as being an aspirational group.

# Their subsequent traveler trajectory style

They'll permanently be at travel's forefront in two ways:

- 1)** as the travelers daring to try new things and
- 2)** those sharing news of their new discoveries.



# Who else should you look out for?

As our Traveler Tribes evolve, it's possible they'll form internal factions and fragment. Or that their members will move around and merge together to form additional Traveler Tribes. So, thinking beyond 2033, here's some potential new Traveler Tribes which we could see in 2043 or 2053:

## The Pioneers of Pioneering

The Pioneering Pathfinders' influential nature could mean that their most progressive members could break away from the core to form a "Super Traveler Tribe". This Super Traveler Tribe will be the most progressive of the progressives.

Finding paths that nobody else can find. From this Traveler Tribe they'll set trends. Fuel future forces. And tailor the next wave of traveler truths.

## The Hardcore Habituals

Deviance and defiance will always exist in society. Especially when it comes to people's refusal to change hardened habits. This could mean that members of the Memory Makers and Travel Tech-fluencers who continue to believe they have no responsibility related to sustainability merge together as a Traveler Tribe who vow to stick to the attitudes of yesteryear. Yes, they'll be frowned upon by many. But their refusal to contribute towards sustainability efforts will, for them, be a badge of honor.

## The Meta Massive

VR clearly has a future in travel. For both planning trips and helping to remember them. And as a phenomenon becomes fashionable, it'll generate

fandom. VR's popularity means that it's on course to be able to this. And within VR's fanbase there'll be a hardcore subset of fans (likely from 2033's Travel Tech-fluencers and Pioneering Pathfinders) whose virtual reality will be their actual reality. Who'll swap jet-setting for head-setting. For meta or for worse.



## The Eternal Explorers

As travel becomes more accessible (with new forms of payment making it cheaper and remote working making it feasible). More sustainable (with biofuels and tourism taxes). And more multipurpose (by being used for more occasions than ever), it'll eventually be feasible for people to be in a permanent state of travel. This will mean a Traveler Tribe of the most enthusiastic travelers, who crave perpetual motion, will form. Living out of their suitcases will be a point of pride. A full-time address will be a sign of shame. No matter how 2033's Traveler Tribes evolve, what new Traveler Tribes emerge: in 2033, 2043, 2053 and beyond, travel will remain one of the greatest joys in life. It'll forever impact lives, open minds and build bridges between cultures. Why?

Because travel is the story of human endeavor

And we are all members of the Traveler Tribes that bring that story to life.



# Appendix 1. Description of travel in 2033

As our Traveler Tribes evolve, it's possible they'll form internal factions and fragment. Or that their members will move around and merge together to form additional Traveler Tribes. So, thinking beyond 2033, here's some potential new Traveler Tribes which we could see in 2043 or 2053:

## Artificial intelligence in 2033:

Even today Artificial Intelligence knows humans well enough to beat the world's best chess players. But by 2033 artificial intelligence will act like humans, to the extent it'll have a personality. This will mean artificial intelligence will be able to 'get to know us' the same way people do.

## Data in 2033:

Artificial intelligence will be clever. But it'll need people's data to power it. A main use of data in 2033 will be to personalize experiences that are the currently same for everyone.

## Virtual reality in 2033:

People with virtual reality devices will use them like they use the smart phone. This will mean virtual reality users will be able to interact with each other in computer generated environments with 4 times the image quality phones today have.

## The planet in 2033:

Climate change won't be solved in 2033. Global temperature's will still be on course to increase by 2.2°C this century. But we'll be doing more to slow it down. And its effects will be more obvious than they are currently as we're expected to emit an extra 1bn tonnes of carbon dioxide than we do now.

## Work in 2033:

Today's remote working trend where 73% of people work partly or totally remotely will still exist. And virtual technology will allow for more remote working possibilities.

## Touchless technology in 2033:

Touchless systems that are controlled by gestures rather than physically touching a device will be more widespread, with their usage rising by 20% a year. These will reduce health risks.

## Biometric data in 2033:

To get people to use touchless systems in 2033, the sharing of data about people's biological measurements and physical characteristics will be encouraged.

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**VISUAL DEVELOPMENT FOR**

# TRAVELER TRIBES 2033

## CONCEPT

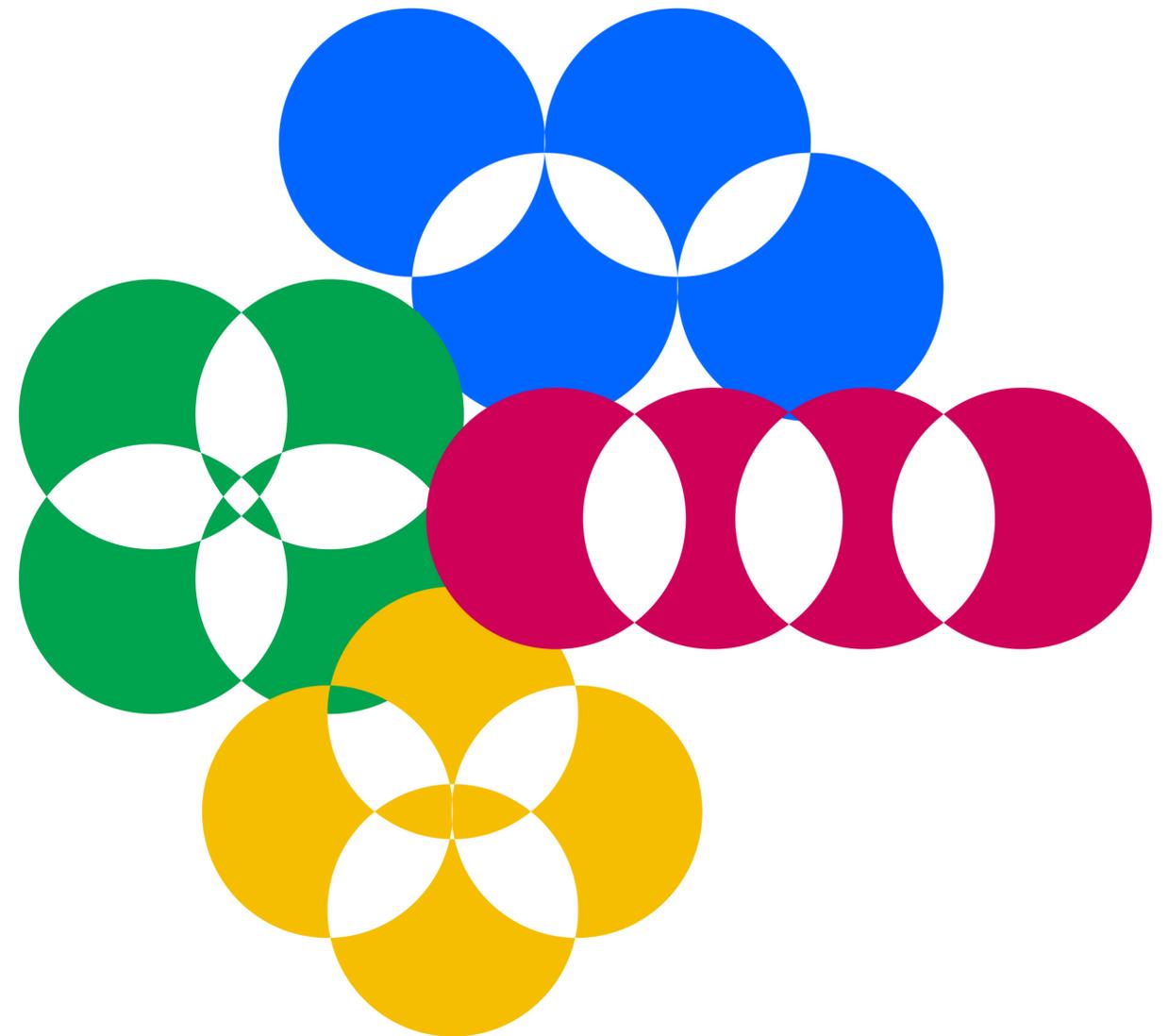
It all begins with one simple shape that represents infinity, unity and harmony.

A circle conveys a meaning of existence, an embrace, an encapsulation. A defined perimeter that creates a sense of belonging, relationships and bonds between those that reside within.

Four Traveler Tribes, each symbolized by four circles. Overlapping circles that convey meanings of connectedness between the Traveler Tribes. After all, in our diversity, we are one. This dynamism propels us to leap forward. Like our world – spinning in perpetual motion.

This freedom of movement governs human evolution and shapes humanity at present and into the future.

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Traveler Tribes 2033*



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