

AMERICAN EXPRESS **TRAVEL**

FUTURE TRAVEL TRENDS

July 9, 2015



the
futures
company



LEISURE TRAVEL IS AN INVESTMENT WORTH MAKING

- People see leisure travel as an investment; an investment that connects them with family, friends, and once-in-a-lifetime experiences
- Despite economic, geopolitical and other uncertainties, people are eager to travel more in the future

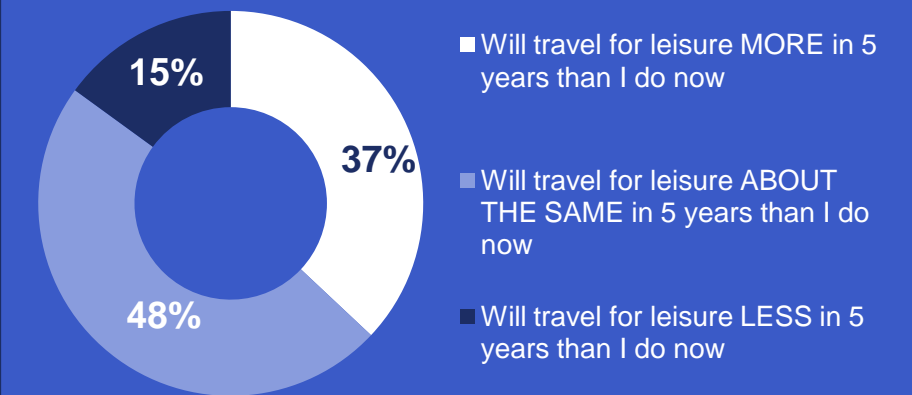
BIGGEST MOTIVATIONS TO TRAVEL	TOTAL	MILLENNIALS	XERS	BOOMERS	MATURES
To relax and unwind	79%	71%	83%	83%	79%
To spend quality time with family/friends	75%	73%	73%	77%	76%
To escape the stress of everyday life	73%	72%	76%	74%	62%
To have new experiences	72%	73%	69%	73%	72%
To experience nature/beautiful scenery	66%	50%	66%	73%	80%
For excitement and adventure	55%	65%	60%	47%	49%

60%

Strongly Disagree/Disagree:
With all of the risk and uncertainty in the world today, it makes me want to travel less

CONSUMERS EXPECT TO TRAVEL MORE

85% of American travelers say they will travel for leisure the same amount or more in 2020 as they do today



TRAVEL IS WORTH THE INVESTMENT

85%

Strongly Agree/Agree:
Spending money on travel is an investment worth making

TRAVEL IS A PRIORITY

64%

Strongly Agree/Agree:
Leisure travel is a big priority in my life

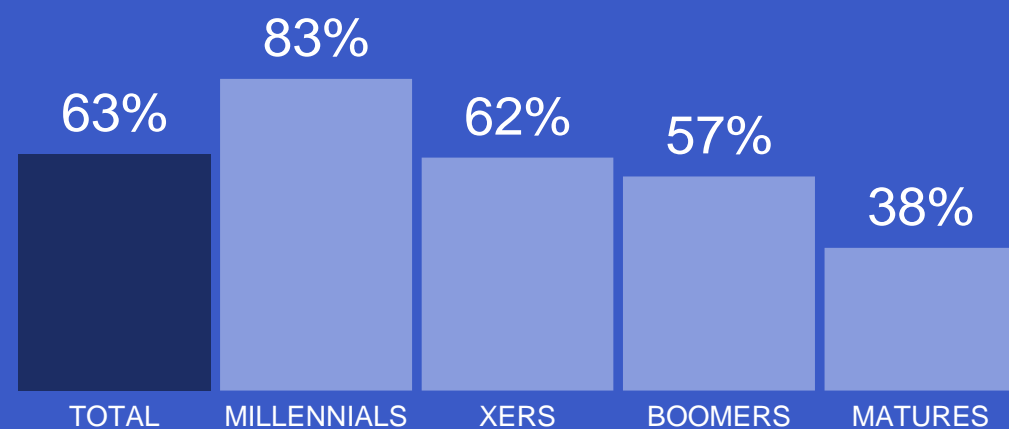
THE FUTURE OF TRAVEL WILL BE HIGH-TECH AND HIGH-TOUCH

- While people see real benefits from using technology during travel—the future travel experience is going to be both high-tech—and high-touch
- In fact, more than 8 in 10 consumers would rather have their future travel experiences dominated by authentic and sincere customer service interactions than streamlined and automated customer service



Completely/Somewhat in favor:

Brands using data about past leisure travel purchases to deliver a more personalized travel experience



© THE FUTURES COMPANY 2015

Strongly Agree/Agree:

Despite digital advances in the travel industry, the value of personal service cannot be replaced

93%

Strongly Agree/Agree:

Many of my travel hassles could be made up for by exceptional customer service

79%

Strongly Agree/Agree:

I expect higher levels of customer service when I travel than in my daily life

72%

PLACING A HIGH VALUE ON EXPERIENCES

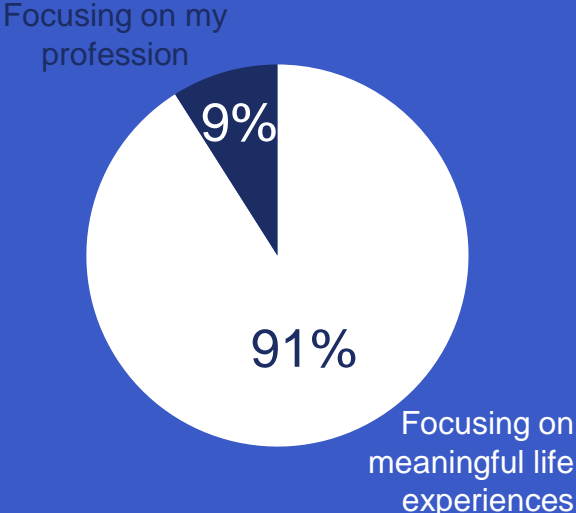
- The future traveler seeks meaningful life experiences over professional success and wants their imprint on their trips – from the planning process to documenting and sharing their experiences with others

90%

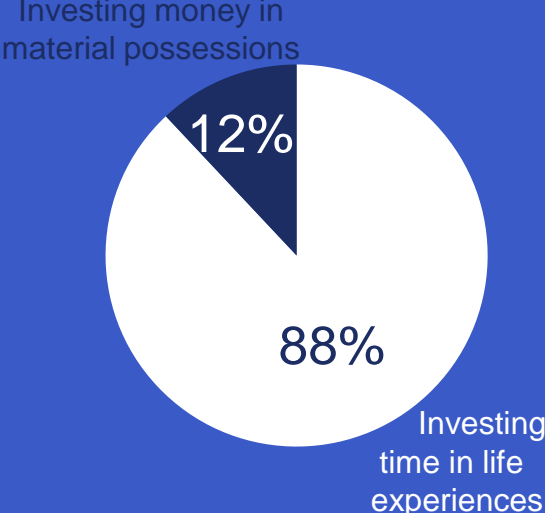
Strongly Agree/Agree:
I appreciate when a travel service company strives to customize my experience based on my preferences



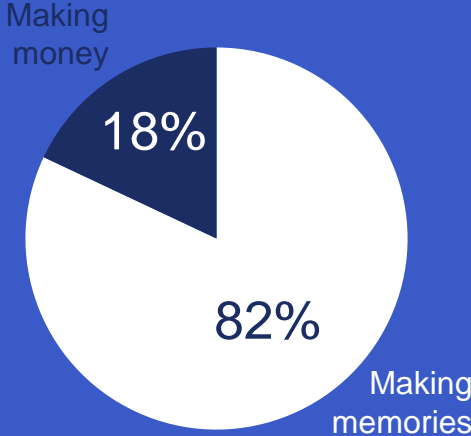
More Personally Rewarding:



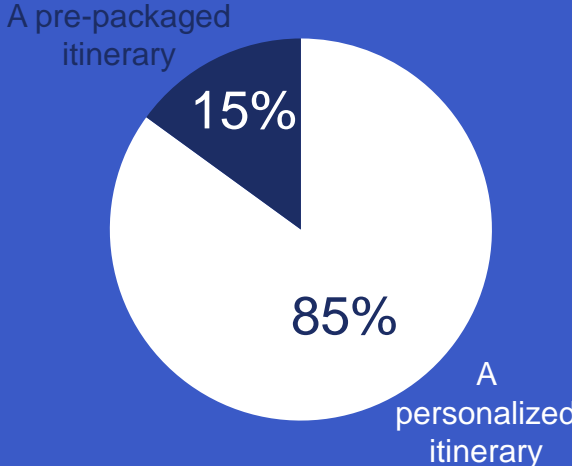
More Personally Rewarding:



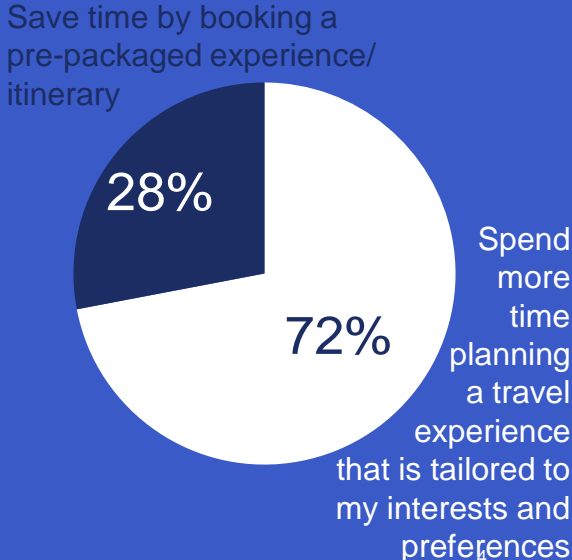
More Personally Rewarding:



Better Describes Preference:



More Likely to do in the Next 5 Years:



TRAVEL WILL NEED TO REFLECT INDIVIDUAL'S DISTINCT NEEDS AND PASSIONS

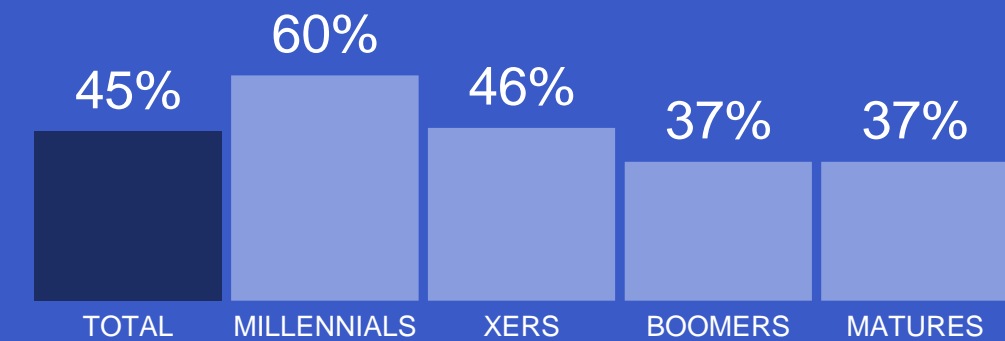
- People want travel that reflects their lives, their passions and their distinct needs and will be less willing to spend money on cookie cutter destinations and service
- Personalization is the next frontier of travel service



TRAVELERS WILL PLACE A PREMIUM ON PERSONALIZED SERVICE

Strongly Agree/Agree:

I would travel more if I received more personalized service during travel

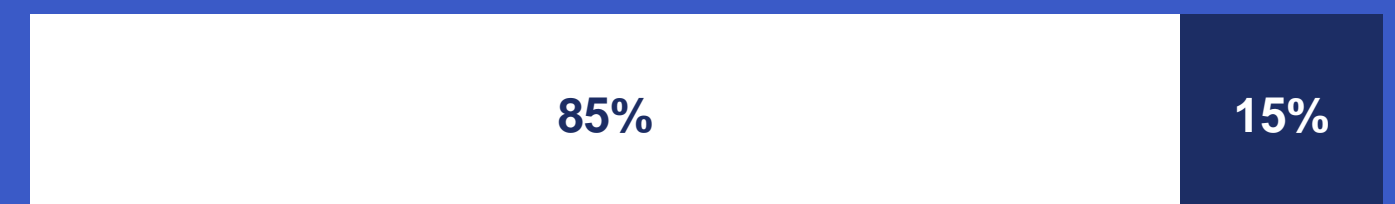


76%

Strongly Agree/Agree:

The level of personalized customer service I receive while traveling can really make or break my trip

Better Describes My Preference When it Comes to Leisure Travel:



- A personalized itinerary
- A pre-packaged itinerary

THE HUMAN TOUCH IS IRREPLACEABLE

- Contrary to public perception that technological advances can replace human customer service for travel planning, booking and in-destination insight, the human touch remains critical, especially for highly personal matters, such as obtaining help when something goes awry
- Tech will help automate the ‘busy work’ of travel but consumers prefer the time and attention of a travel professional for the emotional highs and lows of travel

64%

Strongly Agree/Agree:

When I'm visiting a new/unfamiliar travel destination, I rely on websites or mobile apps to find activities, events, restaurants, etc., that align with my personal interests and preferences

88%

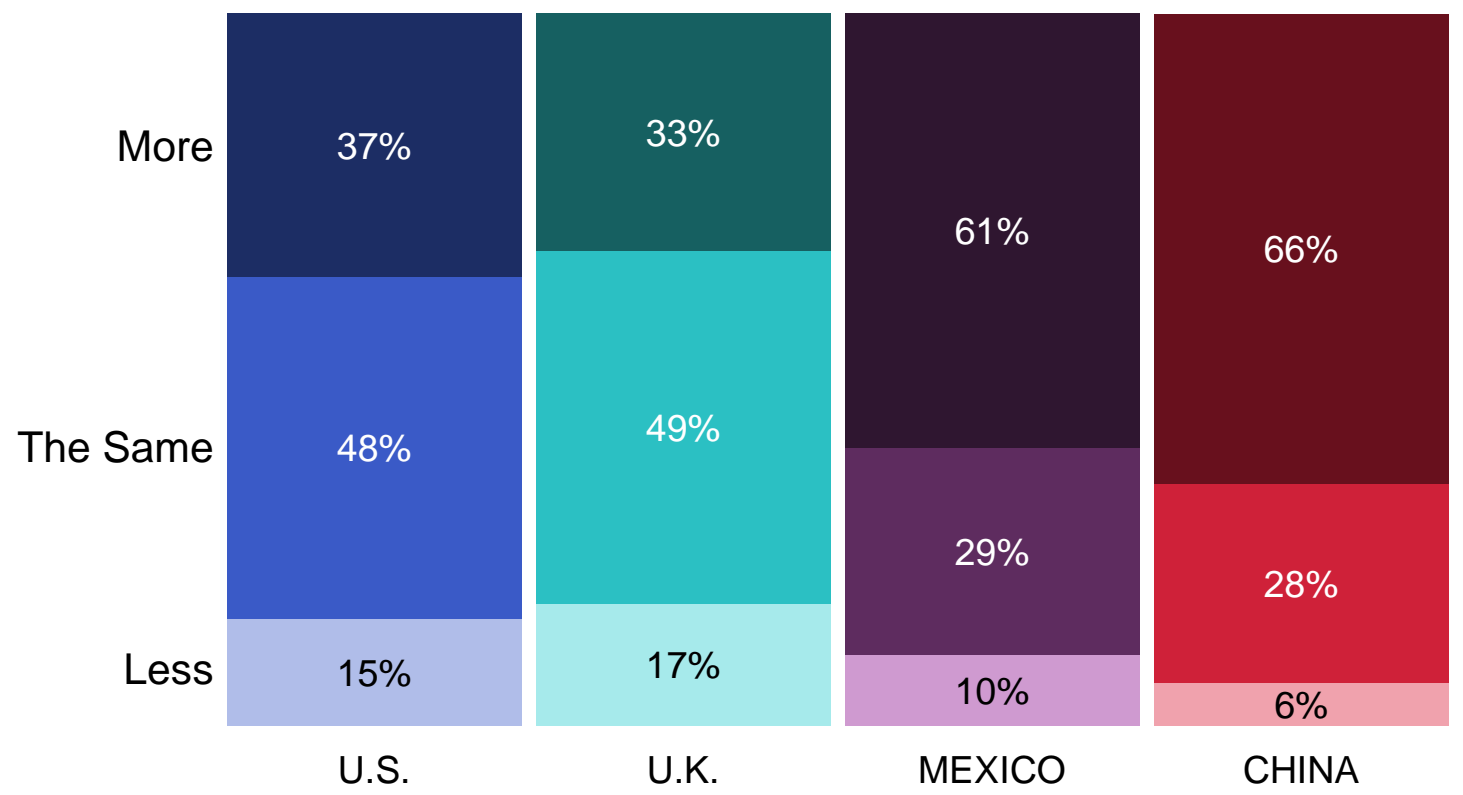
Will be more/equally important in 5 years:

Brands that offer me mobile booking options that are also supported by live travel service professionals

PREFERENCE	TOTAL	MILLENNIALS	XERS	BOOMERS	MATURES
Booking my leisure travel (flights, hotels, activities, etc.)					
Prefer to do online	76%	87%	82%	72%	60%
Prefer to have help from a real live person	24%	13%	18%	28%	40%
Planning my leisure travel (determining where to go, where to stay, what to do, etc.)					
Prefer to do online	73%	83%	78%	69%	57%
Prefer to have help from a real live person	27%	17%	22%	31%	43%
Checking into flights, hotels, etc.					
Prefer to do online	60%	70%	60%	56%	51%
Prefer to have help from a real live person	40%	30%	40%	44%	49%
Learning about the local scene					
Prefer to do online	47%	51%	46%	47%	37%
Prefer to have help from a real live person	53%	49%	54%	53%	63%
Making changes to my leisure travel plans during the trip					
Prefer to do online	41%	55%	46%	33%	31%
Prefer to have help from a real live person	59%	45%	54%	67%	69%
Getting assistance during travel, such as directions, recommendations, etc.					
Prefer to do online	31%	42%	38%	25%	18%
Prefer to have help from a real live person	69%	58%	62%	75%	82%
Getting assistance during travel when something has gone wrong (flight cancellation, lost luggage, etc.)					
Prefer to do online	11%	18%	15%	7%	5%
Prefer to have help from a real live person	89%	82%	85%	93%	95%

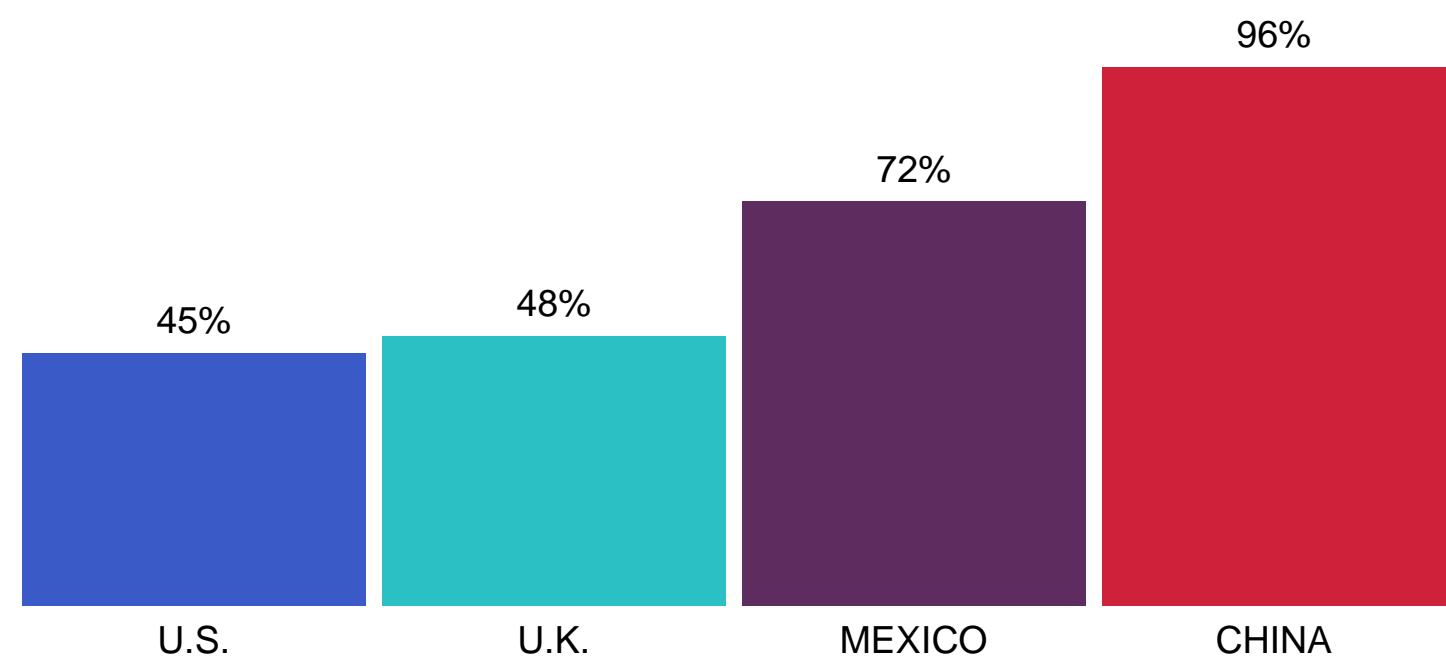
CROSS COUNTRY COMPARISON

5 Years from Now, I Expect to be Traveling...



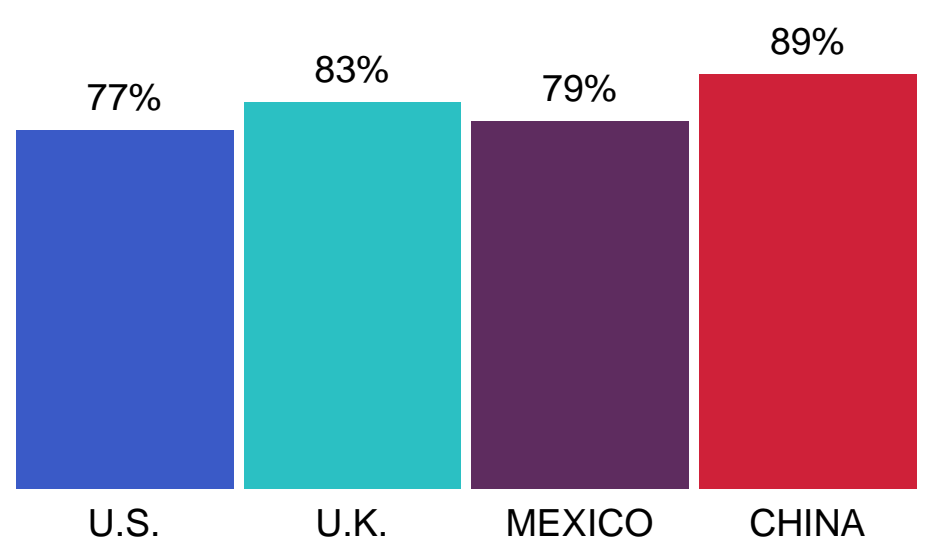
Strongly Agree/Agree:

I would travel more if I received more personalized service during travel



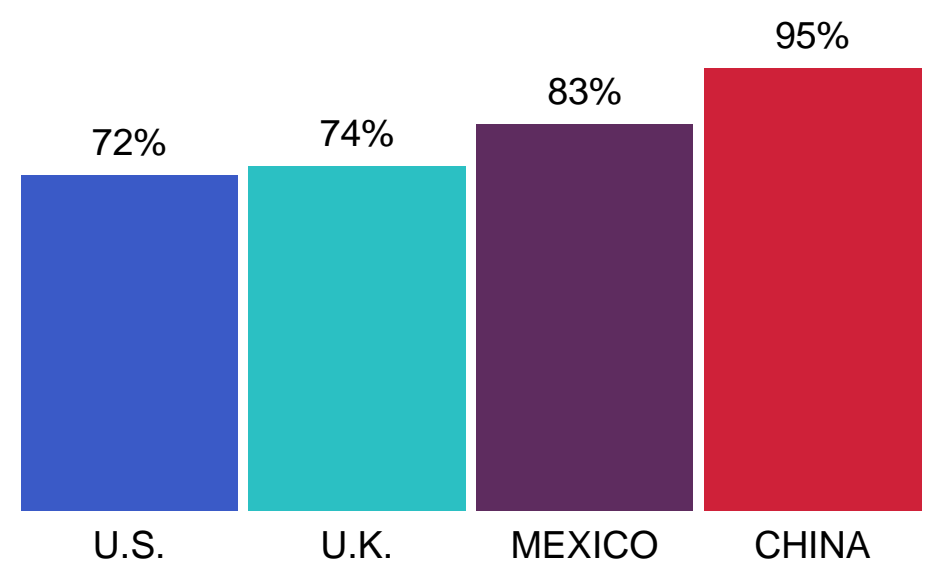
Strongly Agree/Agree:

I do not travel enough



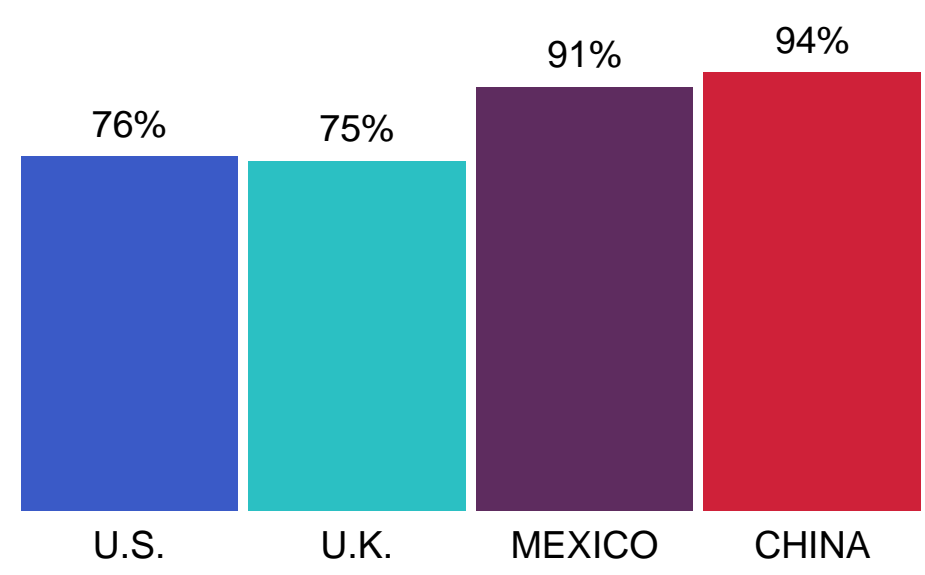
Strongly Agree/Agree:

I expect higher levels of customer service when I travel than in my daily life



Strongly Agree/Agree:

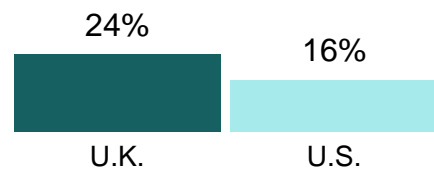
The level of personalized customer service I receive while traveling can really make or break my trip



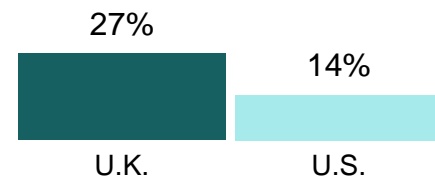
UNIQUE ATTRIBUTES OF U.K. TRAVELERS

U.K. TRAVELERS ARE MORE LIKELY TO USE TRAVEL AGENTS/COUNSELORS AND PACKAGED TOUR SERVICES

Hired/used a **travel agent/counselor** to either help plan vacation or assist while traveling in the past 5 years

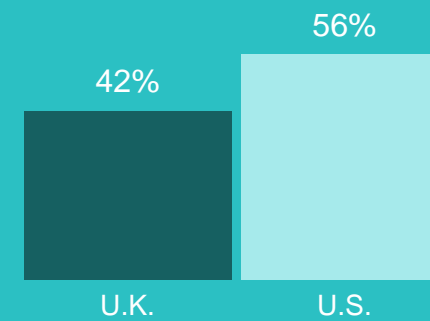


Hired/used a **tour operator or packaged tour service** to either help plan vacation or assist while traveling in the past 5 years

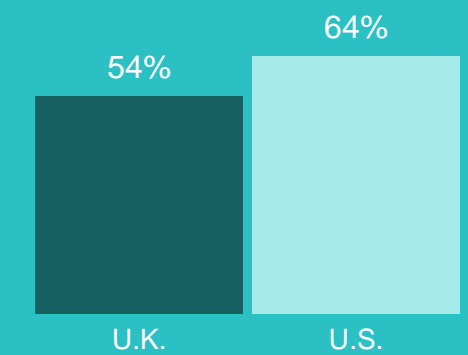


U.K. TRAVELERS ARE LESS ACTIVE ON SOCIAL MEDIA AND THEIR MOBILE DEVICES WHILE TRAVELING

I love to document and share my leisure travel experiences with others



When I'm visiting a new/unfamiliar travel destination, I rely on websites or mobile apps to find activities, events, restaurants, etc., that align with my personal interests and preferences

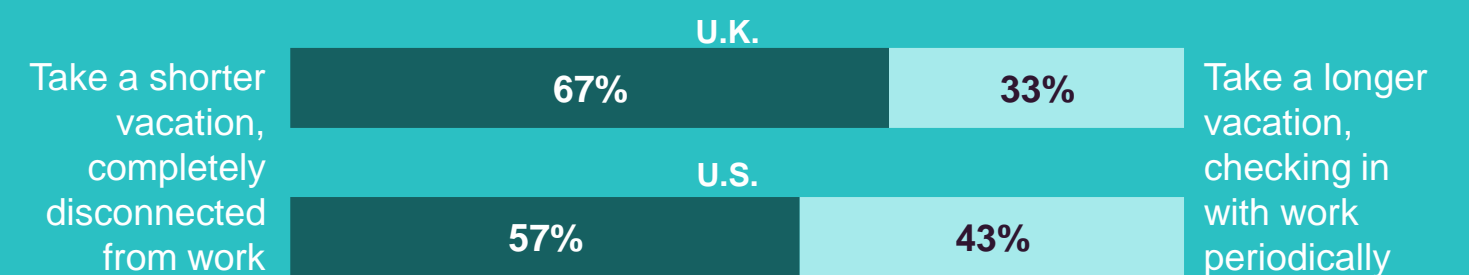


U.K. TRAVELERS WORK LESS WHILE ON VACATION

Never worked on vacation



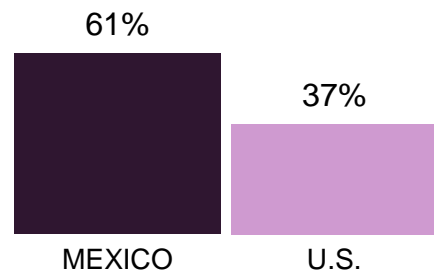
Would Rather



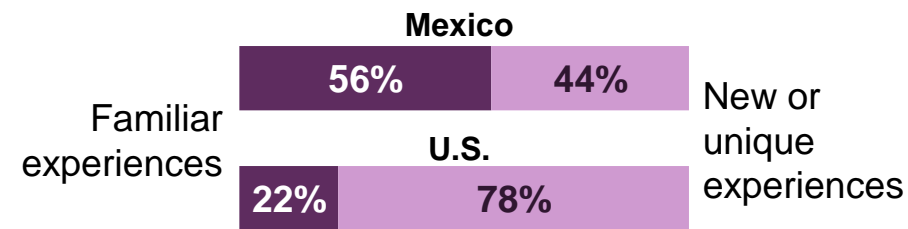
UNIQUE ATTRIBUTES OF MEXICAN TRAVELERS

MEXICAN TRAVELERS ARE EXPECTING TO TRAVEL MORE AND ARE LOOKING FOR MORE FAMILIAR EXPERIENCES

I will travel for leisure more in 5 years than I do now

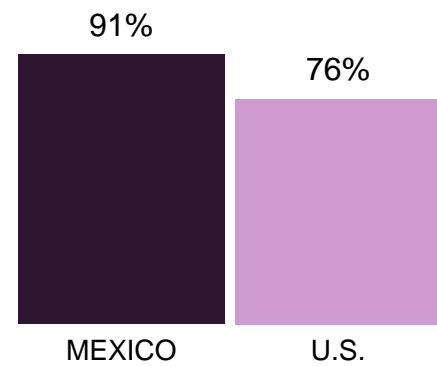


Better Describes Travel Preference

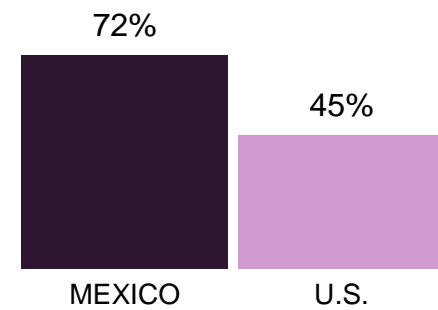


MEXICAN TRAVELERS VALUE SUPERIOR CUSTOMER SERVICE

The level of personalized customer service I receive while traveling can really make or break my trip

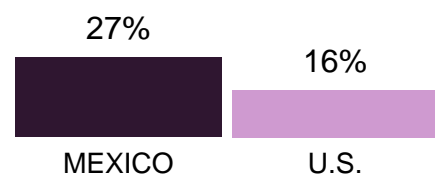


I would travel more if I received more personalized service during travel

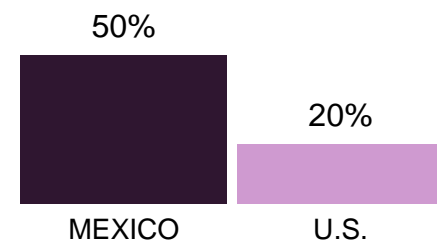


THEY ARE MORE INCLINED TO USE TRAVEL AGENTS/COUNSELORS

Hired/used a **travel agent/counselor** to either help plan vacation or assist while traveling in the past 5 years

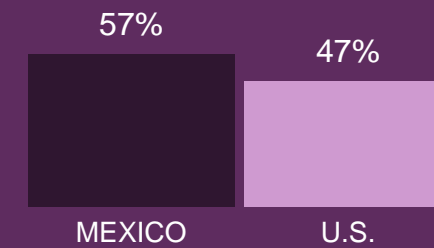


I rely on travel agents/counselors for travel inspiration and ideas

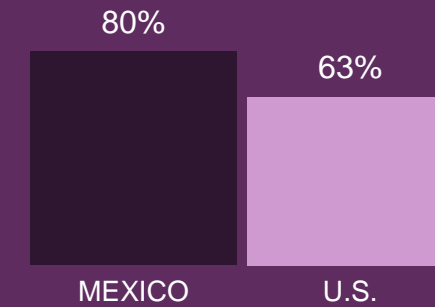


MEXICAN TRAVELERS ARE MORE SOCIAL WHEN THEY TRAVEL - WANTING TO SHARE THEIR EXPERIENCE WITH FRIENDS AND FAMILY WHILE ALSO MEETING NEW PEOPLE

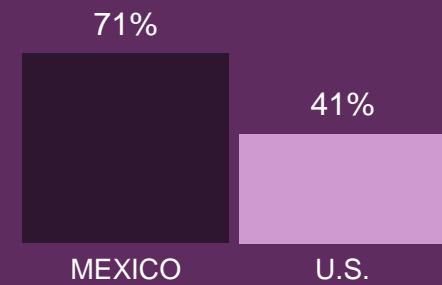
The ability to share my leisure travel experiences with my family and friends via social media adds to the enjoyment of my trip



I really enjoy meeting new people while I'm traveling for leisure

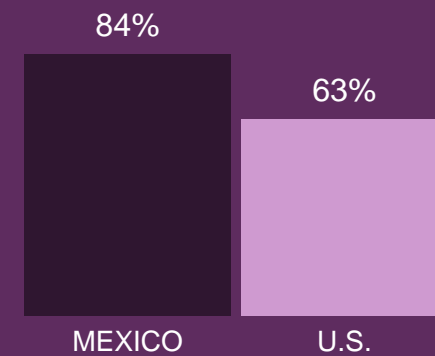


I wish it were easier to meet and interact with local residents when I'm traveling for leisure

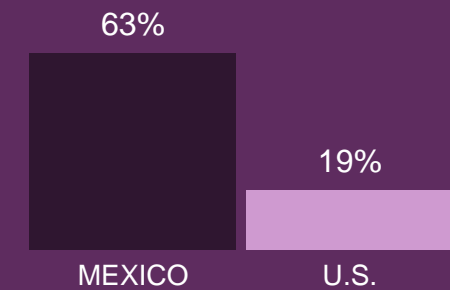


MEXICAN TRAVELERS ARE MORE IN FAVOR OF USING TECHNOLOGY AND DATA TO ENHANCE THEIR EXPERIENCE

Completely/somewhat in favor of brands using data about past leisure travel purchases to deliver a more personalized travel experience

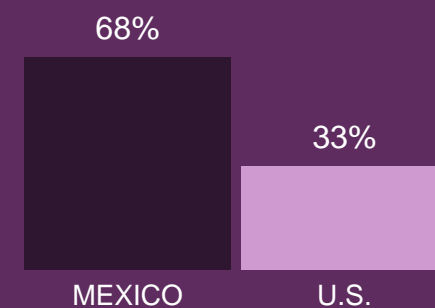


Wearable technologies, such as Google Glass or Apple watch, would greatly improve my leisure travel experience

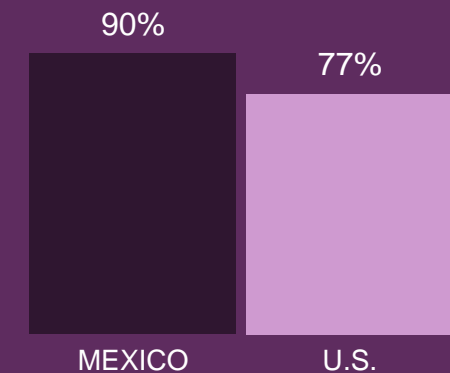


TRAVELERS FROM MEXICO ARE MORE APPRECIATIVE OF EXCELLENT SERVICE

Have had a **Journeymaker moment**



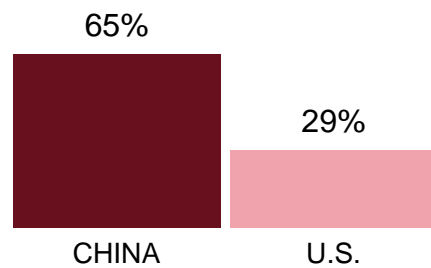
People in the travel service industry deserve more appreciation than they receive



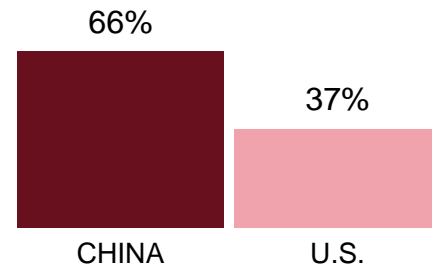
UNIQUE ATTRIBUTES OF CHINESE TRAVELERS

MORE AND MORE CHINESE CITIZENS ARE TRAVELING FOR LEISURE

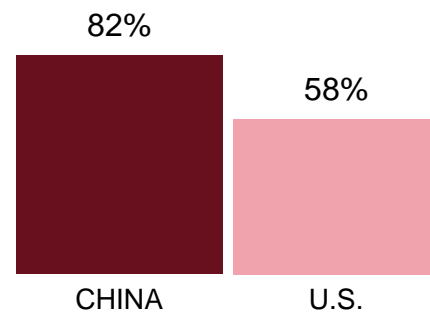
Compared to 5 years ago, I travel for leisure more



I will travel for leisure more in 5 years than I do now

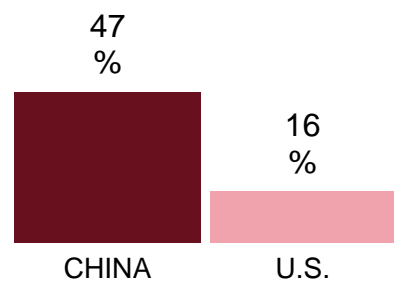


I am willing to sacrifice other areas of my life in order to travel more

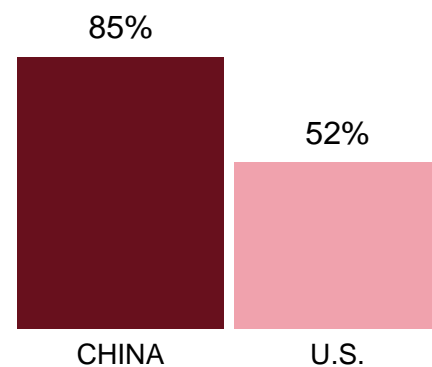


CHINESE TRAVELERS ARE MORE WILLING TO PAY FOR TRAVEL AGENTS/ COUNSELORS

Hired/used a **travel agent/counselor** to either help plan vacation or assist while traveling in the past 5 years

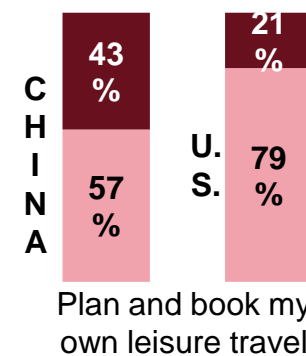


I'd be willing to pay more for the services of a travel agent/counselor who will ensure all my needs are met throughout the course of my trip



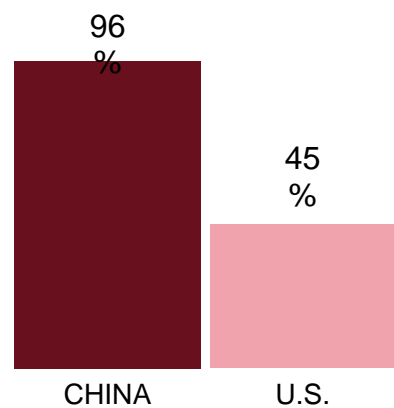
More likely to do in the next 5 years:

Use a travel professional for leisure travel planning and booked

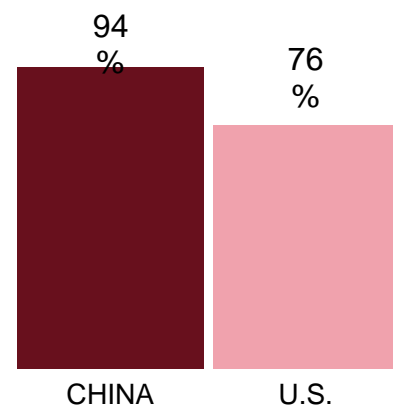


CUSTOMER SERVICE AND PERSONALIZATION ARE ESSENTIAL

I would travel more if I received more personalized service during travel

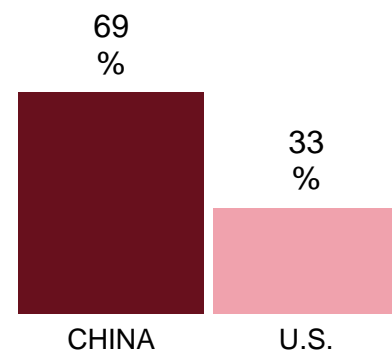


The level of personalized customer service I receive while traveling can really make or break my trip



Will become **MORE** important in the next 5 years:

Staff that provides me with personalized service and experiences

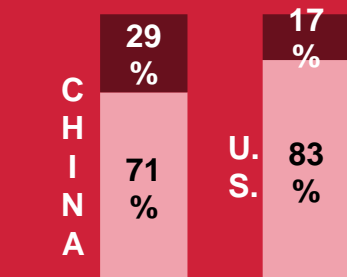


A1, A2, C6, B1, H1, F3, B4, B8

HOWEVER, CHINESE TRAVELERS ARE MORE OPEN TO AUTOMATED SERVICE OR USING TECHNOLOGY TO IMPROVE THEIR TRAVEL EXPERIENCE

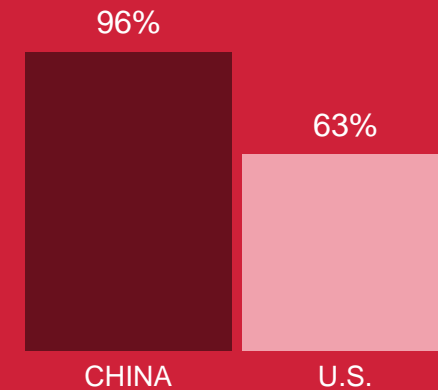
Would Rather Have

Streamlined or automated customer service

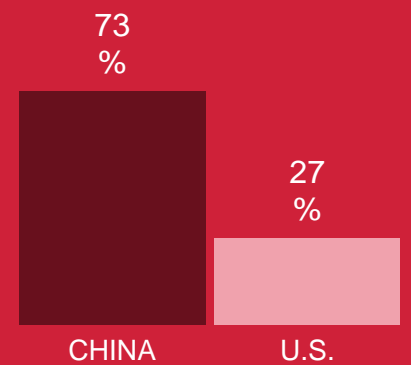


Authentic and sincere customer service interactions

Completely/somewhat in favor of brands using data about past leisure travel purchases to deliver a more personalized travel experience



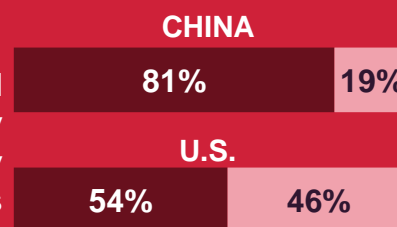
Extremely/Very Interested in doing: Using digital technology that matches my personal interests and preferences to local activities, events, restaurants, etc., while traveling



CHINESE TRAVELERS ALSO RELY ON TECHNOLOGY IN ORDER TO STAY CONNECTED WHILE ON LEISURE TRIPS

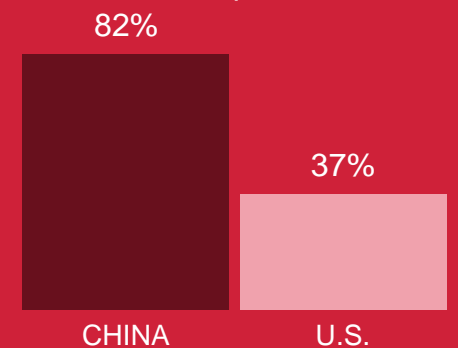
More likely to do

Stay connected to my everyday life through my tech devices



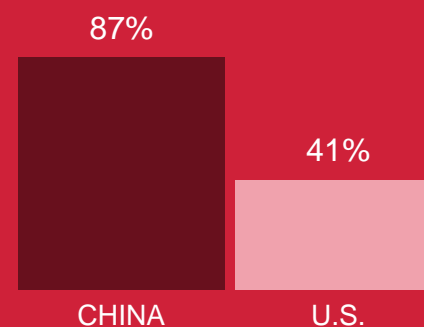
Completely disconnect from technology

Not being able to readily connect to the internet/mobile services detracts from my travel experience

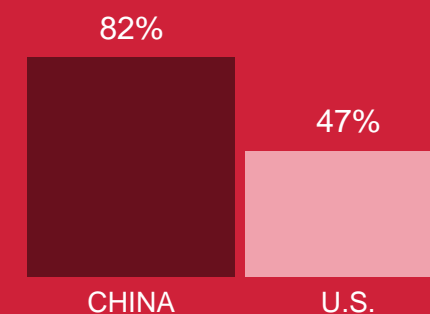


CHINESE TRAVELERS ARE MORE INTERESTED IN SHARING THEIR EXPERIENCE WHETHER IT BE WITH LOCALS, THEIR SOCIAL NETWORKS OR OTHER TRAVELERS

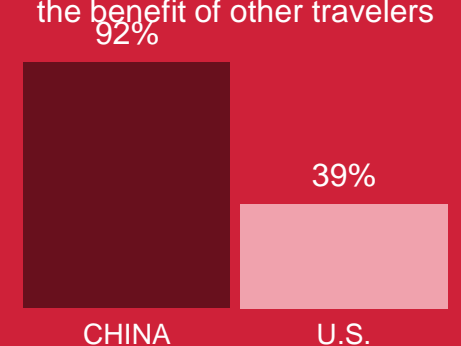
I wish it were easier to meet and interact with local residents when I'm traveling for leisure



The ability to share my leisure travel experiences with my family and friends via social media adds to the enjoyment of my trip



As a traveler, I feel a responsibility to post reviews of my highly positive and highly negative travel experiences for the benefit of other travelers



B5, E4, E3, D1, E2, D6, D3

ABOUT THE AMERICAN EXPRESS FUTURE OF TRAVEL SURVEY

METHODOLOGY

The American Express Future of Travel survey was completed online by 1,007 U.S. consumers who have traveled for leisure at least 2 times in the past 5 years. The survey was conducted by The Futures Company between May 26 and June 3, 2015 and the results reported in this release have an overall margin of error of +/- 3.1 at the 95 percent level of confidence. As a supplement to this research, the survey was also administered in 3 global markets:

- **U.K.:** 1,006 responses were collected between June 2 and June 9, 2015. The results reported in this release have an overall margin of error of +/- 3.1 at the 95 percent level of confidence.
- **MEXICO:** 1,003 responses were collected between June 8 and June 15, 2015. The results reported in this release have an overall margin of error of +/- 3.1 at the 95 percent level of confidence.
- **CHINA:** 1,000 responses were collected between June 24 and July 2, 2015. The results reported in this release have an overall margin of error of +/- 3.1 at the 95 percent level of confidence.

ABOUT AMERICAN EXPRESS TRAVEL

- American Express Travel is a global full-service travel and related lifestyle services provider. For nearly 100 years, American Express has helped those who love to travel customize and elevate their trip experience through world-class service, exclusive programs and premium benefits. Customers have many options for accessing these services and can travel with confidence by having support from American Express whether booking online at www.amextravel.com or speaking with travel and lifestyle experts on the phone or in [retail locations](#).

ABOUT THE FUTURES COMPANY

The Futures Company is a strategic insights and innovation consultancy with a mission of unlocking new sources of growth for our clients. We marry human & cultural insights with growth and innovation strategy to drive more powerful connections with people & culture while unlocking opportunities that can drive business growth. Learn more at thefuturescompany.com and connect with us

here:     