KANTAR CONSULTING

TRAVEL 2035
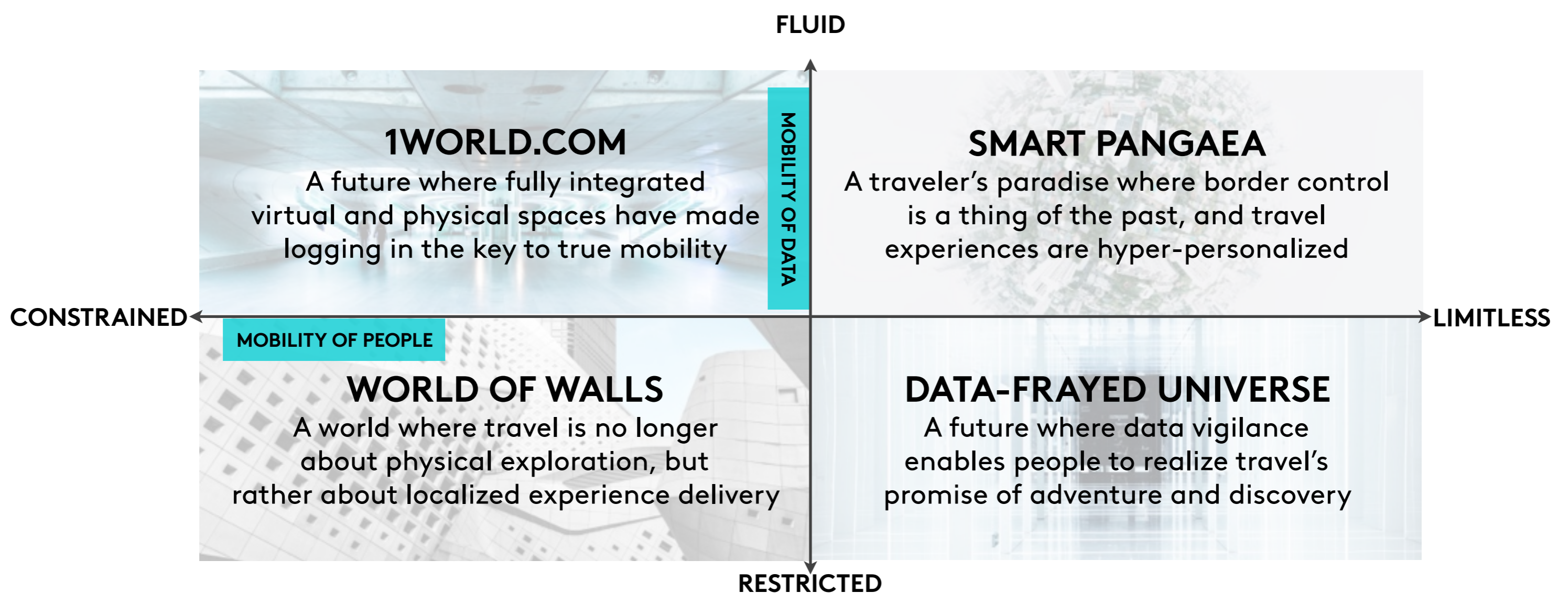
A JOURNEY TO THE FUTURE OF TRAVEL

The year is 2005. The younger George Bush is just starting his second term as President of the United States. Nokia dominates the mobile phone market, and the first iPhone is still two years away from reality. In Asia, Thailand and several of its neighbors are just recovering from the devastation of the 2004 tsunami.

If you were alive and traveling in 2005, could you have imagined a time when one could travel internationally without a map or a guidebook, or when one could confidently stay in a stranger's home rather than in a traditional hotel or hostel? Could you have imagined staying in touch with family and friends without a phone card or access to an Internet café?

And yet here we are, less than 15 years later, and the world of travel has changed so drastically that smartphones – a word that didn't even exist in 2005 – has become the one absolute necessity in planning and taking a trip, displacing not just computers, but maps, guidebooks and cameras too.

There are elements of the future of travel that we can already divine with certainty today. Chief among these:

- We will live in a world that will be much more volatile, uncertain, complex and ambiguous. According to our Global Monitor research, for instance, more than half of people around the world today worry about getting sick in an epidemic. This will only get worse as increasing antibiotic resistance creates more and more superbugs that defy the power of medicine. Amidst this context of uncertainty, people will become increasingly cautious and selective in where and how they travel.

- The technologies we depend on in daily life will become much smarter, with wearables, voice interfaces and the Internet of things building on the ubiquity of mobile phones. As this happens, people will expect more and more seamlessness and personalization in every aspect of the travel experience – from planning a trip to coming home again.

	FLUID	
1WORLD.COM A future where fully integrated virtual and physical spaces have made logging in the key to true mobility	MOBILITY OF DATA	**SMART PANGAEA** A traveler's paradise where border control is a thing of the past, and travel experiences are hyper-personalized
CONSTRAINED ◄	MOBILITY OF PEOPLE	► **LIMITLESS**
WORLD OF WALLS A world where travel is no longer about physical exploration, but rather about localized experience delivery		**DATA-FRAYED UNIVERSE** A future where data vigilance enables people to realize travel's promise of adventure and discovery
	RESTRICTED	

However, exactly what the world of travel will look like in 2035 is far from certain or clear. There are two big critical uncertainties whose resolutions will decide the longer-term future of travel:

- **Data mobility.** Will today's concerns about data privacy result in policies that permanently restrict the gathering, exchange and use of personal data, hampering efforts to make travel optimally seamless and personalized? Or will blockchain technology enable a tokenized and anonymized exchange of data and algorithms that ultimately unleashes the full potential of data to revolutionize the consumer travel experience?

- **Human mobility.** Will today's rising populism and anti-immigration sentiments lead to significantly more stringent border controls, making international travel even harder, esp. for people from emerging middle class countries like China and India? Or will the economic arguments in favor of a more borderless world prevail, leading to global freedom of movement and less visa restrictions?

The different ways that these two big critical uncertainties might resolve give rise to four possible futures for the travel sector:

- **Smart Pangaea.** High mobility of both people and data have created a traveler's paradise where border control is a thing of the past, and hyper-personalized travel experiences based on the open sharing of data is a reality.

- **1World.com**. In this version of the future, data can travel freely across national borders, but people cannot. As a result, physical spaces have had to grow fully functioning digital avatars, and "travel" has increasingly become a virtual endeavor.

- **Data-Frayed Universe.** High human mobility combined with low data mobility has created a world where people embrace the promise of adventure and discovery that travel offers, while depending heavily on data security systems that allow them to travel as ciphers.

- **World of Walls.** Low mobility of both people and data has shifted the travel industry to a model where experiences are created for people where they are, in a way that's increasingly hyper-local and fragmented.

There are early signals today of each of these different versions of the future; and big industry players still have it in their power to push the world in the direction of the future which most benefits them.