TRAVEL REVOLUTION

Where we're going

The travel industry was already changing. We had been witnessing the decline of the high street travel agent for a few decades now as online's relentless advancement continued apace.

But as we speak in 2020, two new colossal forces of change have been brought to bear.

First, in the immediate term, we're seeing a pandemic derail the travel industry. We see bookings plummeting. We see airports falling silent. We see Italian piazzas emptying. The Guardian is quoting ABTA's prediction that up to 18% of travel jobs could be lost.

Secondly we see Artificial Intelligence reaching a critical inflexion point. Emerging technologies can be considered mainstream when they reach 20% adoption rate. New technologies that observe declining adoption before this rate, fail. Now, we're well above that threshold for many AI technologies. Our proprietary global research program 'Retail Revolution', observed that just over 3 in 5 own a smart device and use AI weekly.

It feels, then, like mass AI adoption is close, and many of the futuristic technologies we have been long-promised are already here - poised to give rise to new product propositions and value mechanisms.

The travel industry moves on

As the travel industry attempts to recover from its worst crisis in living memory, and as consumers clamour for escape, we will see the benefits of AI come into sharp focus.

Not today, not tomorrow. But soon. For consumers, there will be benefits. From real-time translations to the democratisation of personal, concierge-style services, AI will make travel safer, easier and more efficient, and will enable people to access more adventure with less risk.

For travel brands, AI represents an opportunity to innovate out of a crisis that will define the sector for a decade. Simply pausing and resuming existing business models will not suffice. Innovation in AI may represent a key lever of growth, with the potential to be a key point of difference and deliver efficiencies for brands managing huge levels of debt. Every saving on every margin will count. Thus from root to tip, AI has the potential to revolutionise the industry.
The following report is designed to be a must-read for those brands and businesses who need to be part of that travel revolution - and details what can be done today to prepare.

The changes you see here will not come into effect immediately. Rather we have attempted to lay out a series of evolutionary milestones and gates - some of which exist today, many of which don't - that will chart the industry's transformation. The ideas you see here are roughly in order of sophistication, starting with those that can be trialled today, ranging right through to those we can only predict and prepare for.

In short: we have a good idea of the final destination. We understand how to get there. But embark upon that journey we must...

About the AI Revolution

AI is increasingly woven into our daily lives. New technology has changed the way we communicate and make travel decisions.

To understand how travel brands can maximise the opportunity of AI, we must move beyond simple technology trends and enhance our understanding of how consumers accept, and trust AI based services in their lives. To this purpose, OMD created a global multi-phased research study to track AI perceptions, adoption and usage as the technology evolves. With a wealth of data from 21 markets, 30,000 consumers and 65 future retail scenarios, we now have a better idea of how brands can create more valued and valuable brand experiences for consumers.

Based on our research, we were able to see that holidaymakers are somewhat advanced when it comes to tech adoption, with high adoption rates for visual search and voice.

A good portion of people already use voice to book basic transport, such as getting a taxi to the airport. Travel consumers are also quite open to receiving holiday recommendations and inspiration with almost two in five (37%) saying they would be open to use Image Search to book travel. These are quite basic interactions but, over time, reinforcing and expanding positive interactions could build trust and habituation, leading to a complete revolution in the way travel is planned, booked and experienced.

This invaluable data asset allows us to understand what consumers are ready for, now and in the future. It enables us to build future-proof AI strategies and guide us towards creating a consumer-focused roadmap for action.

For more information please contact:
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THE ROUTE

The pandemic as an accelerator

Fast Start

For the travel industry, fault lines that previously existed, but were possibly concealed, are now cracking wide open during the pandemic.

These are revealed by OMD's Fast Start Dashboard. We track several hundred health, economic, consumer and media indicators across the globe to provide a picture of changing consumer needs and behaviours. Enabling us to understand both short-term challenges and directional changes in long-term trends.

Whilst the travel sector has seen a huge slump in bookings and purchase related searches- (typically 30-50 % down year on year across global markets). Interest in travel content has only grown – for example online travel content consumption is up 27% in France vs pre-crisis levels.

The shift to mobile platforms has accelerated and the biggest winners are the integrated travel applications that offer a wide range of services often with AI features such as booking.com which is up 60% vs pre-crisis in Italy, and 45% in Germany. People wish to be inspired and to explore possibilities through travel content and integrated services, they are especially open to the new experiences surfaced by technology.

These are but a few of the significant shifts identified and after the crisis they will likely be the drivers of future growth.

Long after COVID-19 has departed, we will continue to feel its effects through shifted consumer expectation and behaviour. With regards to travel, we predict the following post-pandemic need-states will come into sharp focus:

Expectations of sophisticated digital convenience | COVID-19 has acted as both a sampling campaign and a test-bed for digital convenience. Lockdown has honed people's understanding of what is available online and how to get it. This further immersion into the digital sphere and the 'virtualisation of everything' will set expectations as to operational efficiencies and breadth of offering delivered down a broadband cable. Thus COVID-19 will act as a tailwind for the development of AI, as people yearn for simply better online experiences.

Need for smart solutions | We've seen brands, businesses and indeed everyday citizens respond to the pandemic with innovative solutions. From new queuing systems and 'elderly hour', to rapid pop-up hospitals and drive-by testing stations, to 3D printed ventilator parts and Bluetooth facemasks. There is a spirit of innovation and adaptation in the air. Similarly, the travel industry will be expected to follow suit; devising workarounds and shortcuts, and new rules of engagement to allow people to continue to have frictionless - and maybe even contactless - travel.

Nuanced requirements | A recent IPSOS study demonstrated that people were extremely uncertain about entering real life once more, highlighting worries over commuting. Yet also, Airbnb was reporting a surge in bookings for when presumably consumers thought that restrictions would be eased and they would be able to move freely. How can we understand this dichotomy? Getting a fuller and nuanced picture of what travellers fear, and don't fear, may clue us in to how we can help alleviate those concerns using digitised services. In short, as regards to travel, the evidence demonstrates that certain attitudes reflect a populous chomping at the bit to leave their homes, whilst others feel nervous about being among other people. How can emerging AI-based innovations of the kind already detailed be employed to alleviate concerns, mitigate risk factors and get the industry moving again? Literally.

We predict that AI will go some way to solving for these new need-states, greasing the wheels of digital convenience, providing smart solutions when embedded within media touchpoints, and also using data and machine learning to gain a better, more nuanced understanding of consumer motivations.

The transformation of travel

01 AI WILL ENABLE A PROFOUND UNDERSTANDING OF THE TRAVEL CONSUMER

Better data = Better customisation

Modern consumers are often paralysed by the abundance of choice they have at their fingertips. Despite the surfeit of options, the promise of digital means consumers are now demanding a high level of frictionless-ness and personalisation. As the usage of smart devices and digital assistance has become more common, the aspirations for what assistance AI can provide has shifted from the basics - such as basic searching for products and scrolling through pages of results - to more personalised assistance. As evidenced by the Retail Revolution research, people using AI more often are significantly more likely to require relevant advice and

personalised services based on their own habits versus those who use AI less often. Booking a holiday is no different. Whilst travel sites and travel aggregators already use a range of data to recommend travel solutions, as AI's sophistication evolves exponentially, travel purveyors are set to become more effective in their customisation.

The reason is twofold. First, the exponential increase in the amount of data humans are generating on a second-by-second basis. Second, the maturation of AI algorithms and their ability to process that data.

For travel, with vast flows of structured and unstructured data and a highly developed digital ecosystem, the opportunities and threats of machine intelligence are abundant. Every corner of the sector is being touched and will be transformed – regardless of whether this is communications, distribution, service provision or, of course, the transaction.

Beyond the 'vision' statements the hard graft of this change lies in commitment, rigour and ambition. Our experience in the last three years has been one of technical and operational challenges, of course, but the organisational change dimension is clearly the most significant. Nevertheless, if we are

to look back from a mid-2020s vantage point, we can see clearly that starting when we did was essential. The early effort and initial advantages earned will have resulted in structural advantage by that point. Over time, machine intelligence will have become baked into everyone's expectations whether they are those of the consumer, the CFO or other stakeholders. That 'structural' advantage will come, not through any one piece of technology but rather from an organisation's learned posture, rigour and ability to evolve. And maybe that is the one thing that is not new at all!

Brian Harte
Head of Customer Engagement
& E-Marketing at Tourism Ireland

Combined, we now have a mechanism to draw meaning from the oceans of data we generate on a daily basis. AI's handling of data will increasingly get us to a better understanding of our consumer than ever before: drilling down into previously unrecognised connections and hidden correlations between data-sets; surfacing consumer need-states in a more nuanced way.

Obviously, this has important implications for the marketing industry, but also will be of vital importance to the travel industry, which bases its recommendations on a deep understanding of consumer intent.

Through AI it may now be possible to ask: is there a link between a FitBit run-time and searches for hotels around Wimbledon in July? Is there a connection between electronic dance music playlisters and searches for trips to Burning Man? Are people who buy more expensive wine more likely to book tickets for a premium Danube cruise? Not only will we have more data to form opinions, we will also have access to brand new avenues for understanding customer preference.

Here's an example:

'Seeing' consumer preferences with computer vision
Whilst use of cookies are now a commonplace practice to seek and target audiences with a resonant message, the advancement of machine learning means we are now seeing 'computer vision' deployed to gain a firmer understanding of consumer intent.

Computer Vision uses algorithms that recognise and extract meaning from the patterns glimpsed in vast oceans of data -to 'learn' the shape and form of billions of objects and symbols to create a deadly accurate image recognition system in the palm of your hand.

CLUEP is one such platform. Its Convolutional Neural Network can be 'trained' to recognise objects and taught to identify people indulging in hobbies, pastimes and sports, as well as recognise types of car, types of food and drink, and brand logos.

This is a new weapon in a marketer's arsenal: a pictorial signal of a user's interests. Think of the undetected clues, not in meta tags or subject headers or profile info, but from their images, that could power a fantastic insight about a particular cohort.

What if instead of keyword research, you did 'key image research'? What would your demo post images of? A picture of a Strawberry Daquiri cocktail with a beach in soft-focus in the background? A lei around the neck at Honolulu airport? A plane wing featuring the airline's logo?

In short, our understanding of consumer behaviour is about to become more and more sophisticated. There is also another way to look at this. Travel companies should ensure their very own imagery and visual assets are polished, accurate and capable of being found by computer vision. According to OMD's Retail Revolution research, 2 out of 5 respondents would be open to using image search to help book travel. EasyJet recently launched a feature designed to make "your Instagram travel inspiration a reality", using a function within the easyJet app, Look & Book, to allow customers to upload an image, find out where the image was taken, and the availability of flights to that very destination.

As a broad takeout from a marketing standpoint, this means better messaging. More relevant, more timely, more accurate. Travel companies will be able to better reflect the many subtleties in the passion points revealed by those sun- or snow-seekers deep in the research or purchase phase. Communications will move from 'one size fits all' to uniquely tailored.

Accordingly, reflecting that profound understanding in messaging will go a long way to driving understanding, trust and loyalty, and thus return-on-investment. The brands that 'gets me' also gets my business.

02 AI WILL DELIVER FULLY INTEGRATED TRAVEL SERVICES

Democratising personal service

When put into practice, this accelerated understanding of consumer preference from an ever-wider set of signals will act to democratise 'personal service'. So not only can a company reflect that more nuanced understanding of the customer in its advertising, but also in the services it provides.

Currently, we can broadly see two types of vacationers. There are those who seek direct relationships, personal customer service, and rewards for loyalty - and are prepared to pay for it. On the other hand, there are those who prefer affordability over quality. They look for a cheaper price by shopping around and doing the work themselves. However, the cost of this is impersonal mediated communication and effortful, friction-fuelled interaction.

But AI's increasing ubiquity and sophistication will be able to provide a level of service - personalisation and customisation - that previously some were prepared to pay extra for. In short, the cost of personalisation will be dropping rapidly to become affordable to more travel providers, taking the friction out of a page-by-page trawl through a laundry list of options.
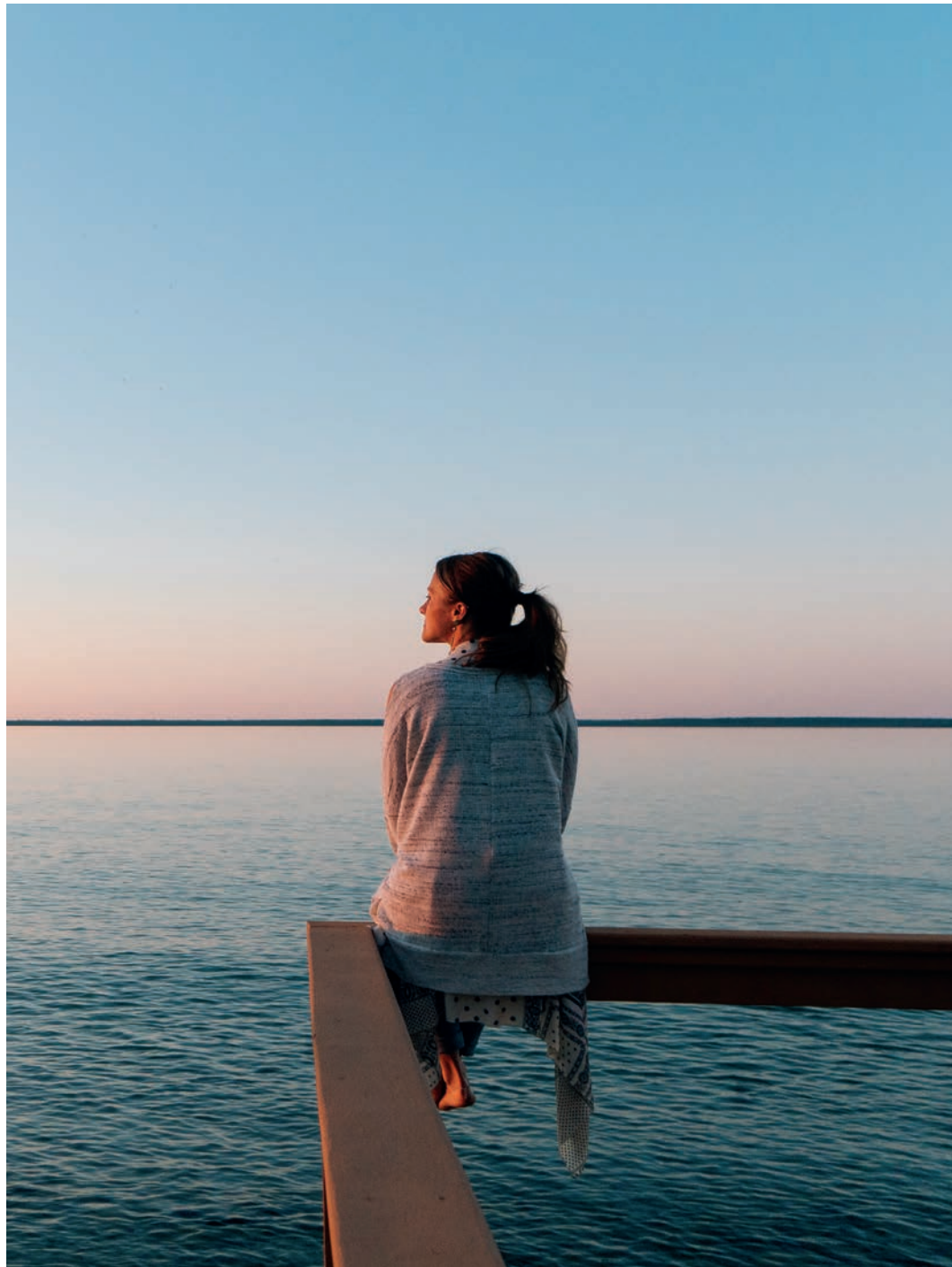
This will present itself in two levels of sophistication:

Open API for travel | Banking is set to be revolutionised by the advent of Open Banking; the enabling of third-parties to use open APIs to deliver a competitive and complementary range of aggregated and cross-disciplinary financial services objectively. The result is joined-up user experience or gathering up and dashboarding of disparate details, operations and platforms.

But imagine Open Banking for travel. A proprietary artificial intelligence specialising in the understanding of travel arrangements; aggregating and processing a wealth of separate travel details - from taxis to transfers, from luggage allowance to lounge access - and presenting it all back to the consumer in one fully-interactive dashboard. Imagine push notifications and geo-location awareness surfacing the right document or booking reference at precisely the right time in the trip. Not only that, but crucially the AI would also understand any alterations to the travel plans, and would immediately and deftly shift and rebook each stage of the trip, re-synchronising each element to make the trip as optimised as possible.

Auto-generating full itineraries | Similarly, as Deep Learning occurs, and the algorithm becomes more experienced through accessing a wider data set, it may then mature into generating complete travel itineraries; planning entire trips by reserving places on tours and booking taxis, to booking restaurants and sending flight check-in reminders. All without the need for any human intervention. The ultimate personalised package tour.

Furthermore, as the algorithm learns which combination of activity works well together; analysing user reviews and occupancy rates, then its recommendations and suggestions will become tighter, more efficient and more appropriate.

Personalised travel curation may soon be accessible to all - de-premiumised if you will - as a result of AI's evolving ability to provide a virtual personal service previously only available to more upmarket options.

Imagine that learning for the way a specific consumer liked to travel and feeding that back into messaging opportunities to promote future travel opportunities.

Ultimately, this will allow travel brands to market the increasing scope of their services, providing integrated travel experiences whilst generating a healthy margin. This is, of course, another way to differentiate from the competition - by claiming the superior algorithm - thus establishing of a greater degree of trust.

03 AI WILL PROVIDE INTELLIGENT ASSISTANCE

Use of data to provide personalised messaging opportunities and customised services is all very well, but could this come across as quite cold and mercantile.

Could a consumer be unsettled by the precision of a recommendation? To mitigate this, we may also come to see AI-driven personal service brought to life through virtual personal assistants (VPAs); an attempt to make any interfaces seem more human. Important given the personalised nature of the communication.

This could be realised via three levels of sophistication:

TravelBots | The entry-level tech would be akin to a basic chatbot but geared up for narrower, travel-based requirements. Many websites already have basic chatbots that can answer the most frequently asked questions, but these will advance in ability in order to handle a broader range of questions, and accommodate more nuanced and accented requests.
This will not be the sole preserve of high-end hotelsand travel agents. Translation will also be a key requirement of TravelBots. Artificial intelligence's ability to translate languages in real-time will be of great value. In addition, the developments in Computer Vision mentioned earlier means object recognition could be employed to reduce friction and uncertainty for tourists. Used in tandem, these technologies will allow fluent communication with locals, and the 'reading' of street signs, price labels, receipts and menus. The result is customers may be encouraged to visit more exotic destinations, knowing they can communicate amongst local culture. Alternatively, burgeoning off-the-beaten-track destinations can attract tourists from further afield by providing communications solutions.
It is worth noting that many of these technologies exist now in an early form. HiJiffy is a comprehensive one-stop-shop chatbot platform for any hotel or travel establishment to integrate into their office systems. Google Maps and Google Lens now have a rudimentary integration allowing the camera's in-lens recognition of certain landmarks to guide a tourist to

their desired tourist spot.
Similarly, Google Translate can be found on some hotel reception counters. Naturally, then, these skills will become more developed and ubiquitous, and will also become more commonplace in the tourism and travel industries. If these technologies are standardised, and that standard proves to be efficacious, then this will go a long way to generating trust between consumer and brand.

Digital Concierges | Second, the Digital Concierge or Personal Assistant. As phone-based assistants like Google Now, Siri and Cortana become more mature and widely used technology, we may see travel plans managed with supreme confidence by personal smartphone VPAs. Despite leaps and bounds by VPAs, at times their functionality can seem glitchy and unreliable. But as these kinks are ironed out, and consumers increasingly rely on their smartphones to act as a digital cross between a butler and a secretary, travel details and logistics may soon be rendered frictionless by the square in the palm of your hand. There are already hints of this on display. Gmail and Google Now work to anticipate a traveller's journey, bringing up flight and check-in details on the way to the airport and sending timely reminders about delays or traffic jams. But imagine this skill writ large, with VPAs being able to take a more involved role across the entire travel process. Whereas TravelBots would be narrow in their application, Alexa, Siri and Cortana would be able to bring a much better understanding of you as a person to its recommendations, factoring in what it knows about you when it makes its Greek restaurant recommendations.

AI Avatars | As AI reaches the peak of its development, its assistance may become embodied inside digital twins or avatars; semi-sentient virtual humans that provide a more recognisable anthropomorphised form for interaction. Technologies like Soul Machines or Samsung Neon (creators of virtual humans) will allow digitally replicated humans to be able to 'speak' their advice to consumers, and perhaps respond with a smile, a raise of an eyebrow or a nod of the head. This also has implications for brand touchpoints. Imagine Hotels. com asset Captain Obvious dispensing travel advice as a fully animated avatar. His 'digital likeness' could be captured within an interactive audio ad, a chatbot or indeed a personalised banner ad. With AI, brand assets become totally malleable and scalable. In marketing, these AI Avatars can be built into communications touchpoints. Not only as a way of gaining an understanding of consumers through real-time interactions but also to help normalise conversation with a non-human, demonstrating the value they can add.

Ambient intelligence & phygital environments | As the development of these intelligences grow, AI will also come to stand for Ambient Intelligence. Or perhaps Always Integrated too. In short, we may encounter AI outside the chatbot and smartphone, rather than encountered across common travel touchpoints. Hence, expect to see VPAs in airports, train and plane seatbacks, in taxis, in hotel lobbies and hotel rooms,

and on travel company booking lines. Hotel rooms essentially become a computer you spend the night in, with an AI built in to answer requests for late-night snacks or control the a/c.
Also, later down the line, technology will allow virtual humans to be 'captured' in an OOH unit to act as an information point at train stations and tourist attractions. Or even further down the line, AI may be embodied in the real world. Hilton has recently introduced a robotised assistant called Connie to work front-of-house, and of course, the advent of driverless cars may mean airport pick-ups may become a service. Finally, the pandemic has seen the high-street take a knock. The chief executive of the British Property Federation, Melanie Leech, stated the predicted 50% reduction in shops on a typical high street was now likely to take place over a shorter timeframe. However, it is also an opportunity for a renaissance as shops modernise for the digital generation. AI may lead to a rebirth of the high street travel agent. Though the sight of a high street travel agent is much less prevalent in 2020, as travel moves into the online space, in other sectors, in a reversal, we are seeing digital-first platforms move into retail space - e.g. Alibaba Malls and Amazon Go Stores. Thus, we may see the return of travel companies to the high street as an extension of their online platform. This time, however, more digitally sophisticated, integrated and experiential than their 1980's equivalent. And AI will have a role to play in those new 'phygital' incarnations.

04 AI WILL HELP OPTIMISE PRICING, MOVEMENT & TRANSPORT

Data for travel optimisation

AI will also grant us the ability to more accurately predict demand versus availability. Spotting signals in data that will likely impact the economics of travel - wars, oil prices, global economic performance, weather events - will be a skill in demand. Ultimately, this will lead to more complex dynamic pricing frameworks, but that increasing 'blackboxing' of costs and availability may result in a backlash from consumers who feel they don't understand why certain tickets, packages and accommodation are priced up in a particular way. Outside of pricing and 'on location' AI's ability to analyse flows and movements of people and transport - from predicting flight delays and managing queues at rides - will take some of the stress out of trips. For instance, Disney is already employing wearable tech to track and monitor people moving around their parks, allowing them to access queues at the right time to ensure a shorter wait. AI may also be able to better understand

the environmental conditions and health metrics associated with particular destinations. Consumers may be able to filter recommendations on the basis of the carbon impact of certain travel options or local health care quality. All this empowers the customer to make more informed decisions.

Crucially, those same data points driving pricing and inventory should also drive targeting and media investment. Factoring that data into propensity modelling will help optimise those products and services to better reflect the 'unseen reality' behind a particular trip - a rising temperature, its increasing popularity, an unsettled political situation - and provide a travel company with a better return on investment.

05 AI WILL AUGMENT MARKETING CREATIVE

Better assets, quicker
It's not just AI's ability to make recommendations and simulate human ability that will benefit the travel industry. AI will become integrated into more creative endeavours too. AI & ML can also provide great opportunities to automate and augment the creation of collateral that will dramatise and bring to life aspects of a holiday consumers wish to know more about.

It will be able to help with the automation, representation and rendering of collateral. Again, democratising the creative toolkit and placing it in the hands of smaller establishments and operations.

Take Matterport. Matterport uses AI to turn flat plane imagery into 'dimensionalised' or 'solid' objects, meaning with one sweep of an iPhone you can turn a 'flat' image into an interactive 'dollhouse' 3-D model. This is a step on from taking photos of a hotel room, or providing a 360 sweep - and is available at a relatively low-cost. Soon AI will allow hotels, Airbnb property owners, museums, airports, and train stations to provide hi-tech, navigable maps of their locations.

Also, platforms like Synthesia, an AI-driven lipsync tool that reanimates lips and face, will allow the rapid re-versioning and re-editing of video assets featuring actors, enabling the most cost-effective use of resources as they can be tweaked to 're-mouth' new dialogue - even in a different language - for a fraction of the cost of a reshoot.

In marketing, as we've mentioned, this can lead to agile creative that can be altered and re-versioned with little intervention. A single piece of creative, therefore, could be adapted to fulfil many different product offers and indeed need-states: from a host of different destinations and

dates of travel to languages and accents, without the need for an expensive shoot or reshoots. Investment in AI would in the long-run, likely save money.

If you couple this agile, ultra-adaptable creative with a deep data-led understanding of the travel consumer, and the ability to bring humanised interaction into communications, then we will have the ability to create messaging opportunities that speak to the consumer like never before - figuratively and literally.
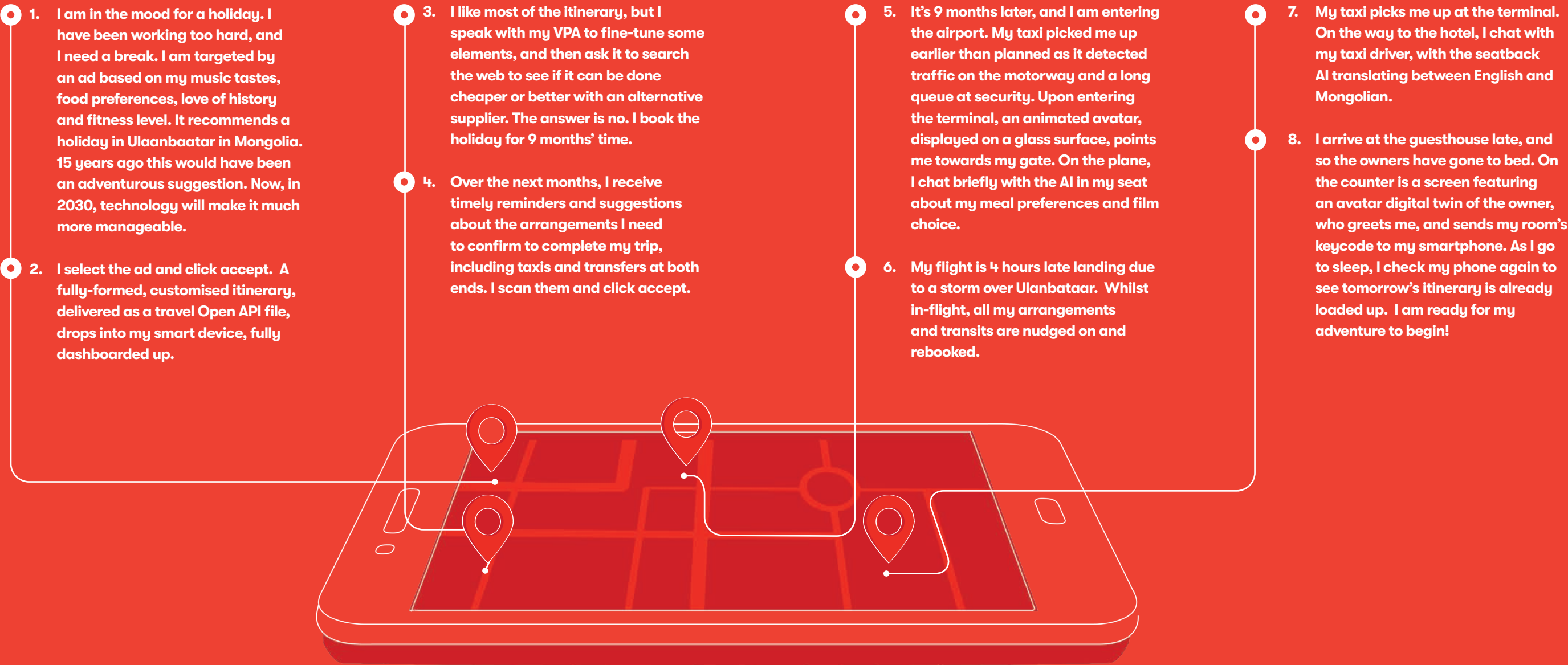
If you ask a search engine "what is AI?" you get 3,850,000,000 search results in 0.63 seconds. So, I'm a human, asking an AI model what the essence of itself is.?! Moreover, it can give me the answer! And this just serves to illustrate how ubiquitous AI and its many different guises and applications are today.

As well as search engines, we regularly interact with chatbots and voice assistants, and increasingly this branch of technology is accelerating at pace within the travel industry as a result of the pandemic. As an industry we've needed to adapt quickly to a changing and volatile world; and AI has been a critical component in that. Enabling us as a business to ingest and analyse huge volumes of global data and intelligence, that in turn can help us to re-emerge and reshape the travel of today and of the future.

Wider still, AI in the form of facial recognition and other branches of biometrics are revolutionising the 360 travel experience; typically this is with fingerprint, facial or iris recognition which speeds up passenger journeys through checkpoint... and so the impact of AI on our industry is seismic, and we should expect to see a continuation of this evolution in response to consumer and safety needs.

AI is helping our industry bring some element of certainty to an uncertain world – and will continue to be central to the recovery and re-imagining of travel.

Suzanne Perry
Global Head of Media &
Partnerships at Skyscanner

Travel 2030: A Possible Future Customer Journey

1. I am in the mood for a holiday. I have been working too hard, and I need a break. I am targeted by an ad based on my music tastes, food preferences, love of history and fitness level. It recommends a holiday in Ulaanbaatar in Mongolia. 15 years ago this would have been an adventurous suggestion. Now, in 2030, technology will make it much more manageable.

2. I select the ad and click accept. A fully-formed, customised itinerary, delivered as a travel Open API file, drops into my smart device, fully dashboarded up.

3. I like most of the itinerary, but I speak with my VPA to fine-tune some elements, and then ask it to search the web to see if it can be done cheaper or better with an alternative supplier. The answer is no. I book the holiday for 9 months' time.

4. Over the next months, I receive timely reminders and suggestions about the arrangements I need to confirm to complete my trip, including taxis and transfers at both ends. I scan them and click accept.

5. It's 9 months later, and I am entering the airport. My taxi picked me up earlier than planned as it detected traffic on the motorway and a long queue at security. Upon entering the terminal, an animated avatar, displayed on a glass surface, points me towards my gate. On the plane, I chat briefly with the AI in my seat about my meal preferences and film choice.

6. My flight is 4 hours late landing due to a storm over Ulanbataar. Whilst in-flight, all my arrangements and transits are nudged on and rebooked.

7. My taxi picks me up at the terminal. On the way to the hotel, I chat with my taxi driver, with the seatback AI translating between English and Mongolian.

8. I arrive at the guesthouse late, and so the owners have gone to bed. On the counter is a screen featuring an avatar digital twin of the owner, who greets me, and sends my room's keycode to my smartphone. As I go to sleep, I check my phone again to see tomorrow's itinerary is already loaded up. I am ready for my adventure to begin!

Future flashpoints

The preceding detail is an attempt to envisage how an AI-infused travel industry could look. However, it is not assured. Whilst we can be relatively confident about the general direction of travel, we cannot be so certain about the specifics. Moreover, we cannot know about any potential and unforeseen rocks in the road that could hinder AI's development, or indeed make its presence in society less welcome. Here are three potential future flashpoints that may derail AI's integration into the travel industry:

Travel slump | In the short term, we may see people much more cautious about travel, or at least committing to travel. Travel companies will spend some time recouping losses made in 2020, which may throw chances of investment into new technologies into doubt. Ironically, at a time when the post-COVID consumer will be seeking reassurances about the safety, this is a perfect opportunity to look at AI's ability to provide up-to-date and reliable data on destinations, but nevertheless, we predict AI may not be at the top of many travel companies' agendas for a little while.

Privacy fightback | COVID-19 has seen a new mandate for governments to take more top-down control of their societies via contact tracing apps, facial recognition and smart city war-rooms. This was layered on top of existing conversations about how much data tech giants possess and how safe it is for them to possess it. In time, we predict we could see a 'privacy fightback', where citizens, acutely aware of how measured and monitored they are, take to using
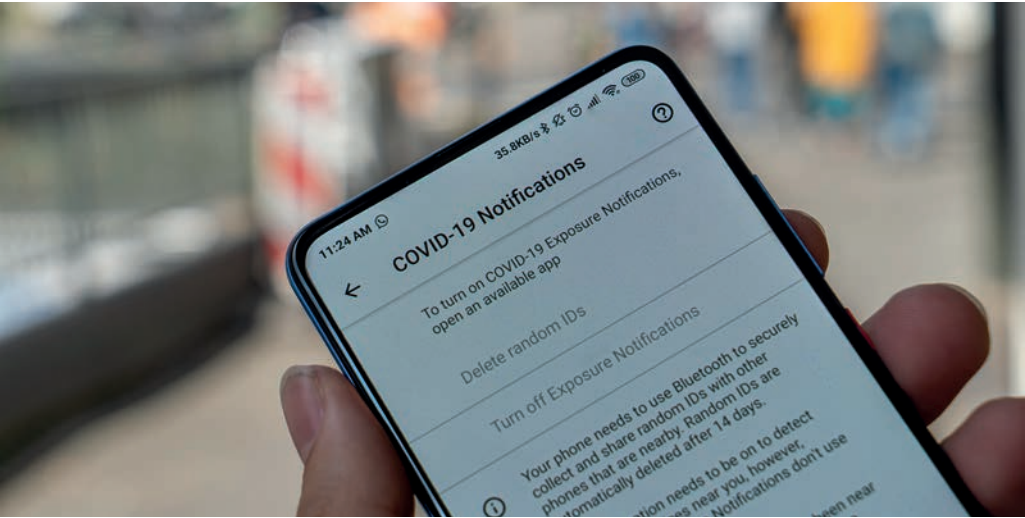
'data anonymisers' and VPNs to cover their tracks. This would be so much more significant than simply 'turning off cookies'. Given AI thrives on data, food for its Machine Learning capabilities, an encroaching 'data darkness' could inhibit AI's abilities to get to know its users. Whilst AI could still use external, non-personal data sources to make its recommendations, e.g. weather; it would mean the deep personalisation we have examined here would be restricted. There is also an honest debate to be had about the effectiveness of personalisation. Whilst many use it, and many wish they were better at it, some marketers' concerns about exactly how practical it is will need to be properly addressed, and any discontent quelled. And if not, AI may find it has no place in a marketer's toolkit.

Human fightback | Building on the previous point about a privacy fightback, we may see a concerted and organised effort to reassert the human contributions within our society, and highlight those qualities inimitable to even the most sophisticated AI. We could see a counter-attack underscore two chief concerns. First, worries that AI will create unemployment. Whilst these worries stretch across many sectors and industries, travel would be included. AI could threaten the livelihoods of translators and tour guides, and later in its development taxi drivers and even hotel staff [there is a hotel in Japan staffed entirely by robots] and whilst this is a flippant novelty, it may point towards a more sober and realistic future.

Your route to the future

3 Key Takeaways

Identify the use case | Ascertain future need-states of consumers after COVID-19. What will consumers want and how can AI assist in its provision? Determine how you could use AI to better find your consumers. Look to connect disparate data-sets to gain a deeper understanding of your demo. Locate areas within the customer journey that would benefit from frictionless-ness, and work to understand how AI could solve for that. Investigate automated customer service and voice assistants.

Augment your Marketing Processes | Automate and improve your collateral and assets using AI-driven tools. Are your banners voice-interactive? Can your product be illustrated and demonstrated beyond the image?

Perfect your operations: AI is less of a channel and more of a gateway into an existing and expanded piece of communication, data-set or experience. The quality of the 'destination' rather than the 'route' should draw the focus, so ask more questions about what lies behind and beyond the AI. Right now, do your back-end operations work as it should?
AI works as an augmentation, not a sticking plaster.

Roadmap Your Progress | Don't expect to revolutionise your approach overnight. Roadmap your changes over time. How do you progress from chatbot to avatar? What is the route? Find your accessible, affordable entry points into the technology. Work on incremental changes. Use the OMG Innovation Agenda system.

The Innovation Agenda

The innovations and transformations you have seen described here may seem distant, far-fetched and futuristic, but we predict they will arrive soon in some form or another.

In responding to this change, it is easy and understandable for businesses and brands to fall into two traps. First, Under-reaction. Brands would be forgiven for considering the innovations here as distant, intangible, silly, expensive and for 'another day'. Second, Over-reaction. Marketers perturbed by the speed of change may seek to modernise their brand in the blink of an eye - not an easy task.
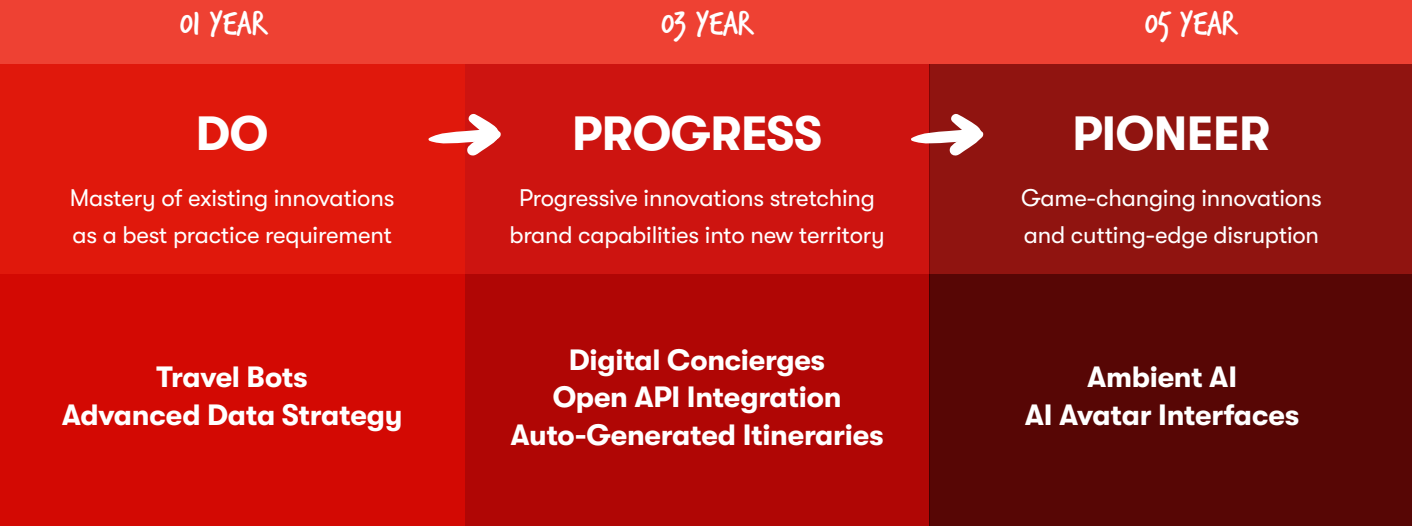
Within the third, middle way lies the solution. Like micro-evolution, you cannot view innovation close up; rather it can

only be detected over time; an accretion of marginal gains and improvements. For every iPhone, there was a Palm Pilot. For every Tesla, there was a DeLorean. To steer that perfect path, you need to establish a guidance system. That means frameworks and processes that are geared to adapting to the inevitable change in increments and over time.

Identify the first steps, second steps and subsequent stepping stones. Shine a spotlight on entry points, stretch goals and moonshots, and then begin by institutionalising floor-raising exercises as a prerequisite for the changes we will behold.

In short, don't advocate a vertical takeoff, rather embark upon a slow climb to cruising altitude.

A potential innovation system could look like this:

01 YEAR	03 YEAR	05 YEAR
DO →	**PROGRESS** →	**PIONEER**
Mastery of existing innovations as a best practice requirement	Progressive innovations stretching brand capabilities into new territory	Game-changing innovations and cutting-edge disruption
Travel Bots **Advanced Data Strategy**	**Digital Concierges** **Open API Integration** **Auto-Generated Itineraries**	**Ambient AI** **AI Avatar Interfaces**

**Plan for the decade. Execute by year. Act by quarter**

Summary

Kevin Kelly likens the future to raindrops running down a car windscreen: whilst we cannot predict the individual path of each raindrop, we know the general direction of each one is 'down'.

To respond to transformations the travel industry will witness, and to plot the correct course, we must all operate on the assumption that 'a' future is inevitable.

So, whilst no one can perfectly predict future tech as it applies to travel, we can already sense the direction of the general flow: it is towards artificial intelligence, intelligent assistance and high-levels of personalisation.

Whilst we don't know the specifics, we do know the generalities. And that's enough to prepare.
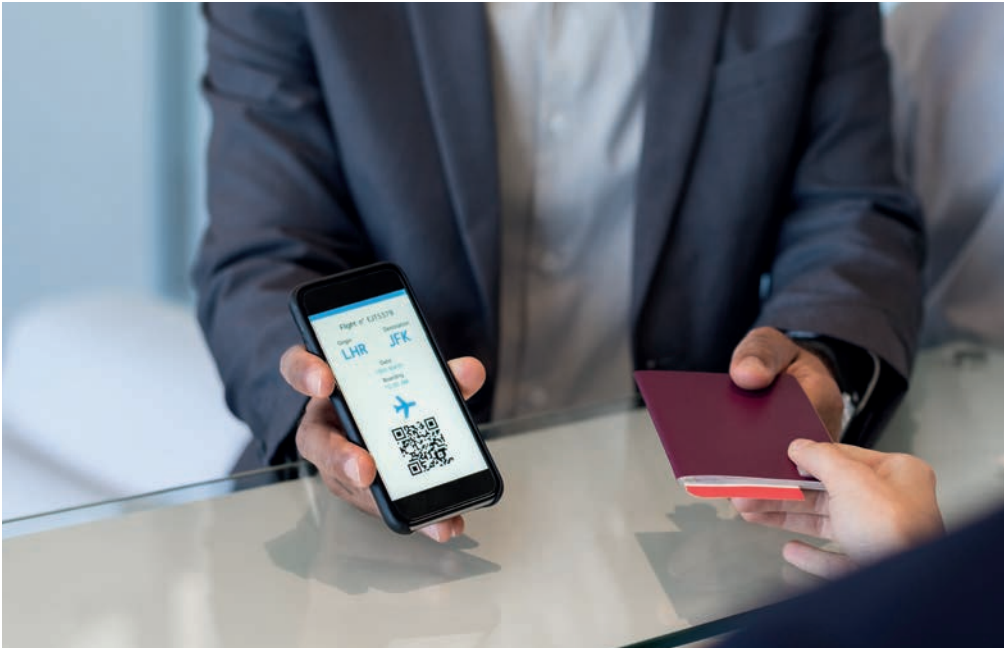
HELPING SET YOUR COURSE FOR THE FUTURE

WANT TO MAP YOUR INNOVATION ROAD MAP?

Our Futures team are ready to help you plan the 'do', 'progress' and 'pioneer' strategies for your brand, through a bespoke innovation agenda workshop.

These short- to long-term strategies will advise you on the technologies your consumers are using and introduce you to the partners who can put your name on the map.

WANT TO LEARN HOW TO MAKE BETTER DECISIONS, FASTER?

To help navigate the road to a 'new normal', learning from, and acting upon data signals at scale and speed is crucial. Our proprietary Fast Start Dashboard combines multiple data sources, fuelling more informed decisions while providing a single version of the truth on emerging trends & opportunities, allowing you to navigate these complex decisions now & in the weeks and months ahead.

WANT TO LEARN ABOUT TECHNOLOGIES TO EVALUATE YOUR BRAND PRESENCE?

The OMD Techlab team are the brains behind the 'AI revolution' research and are leading discussions around technology and innovation to help you with:

- 360 Audit and 'Voice Readiness' assessments
- AI Planning; Discovery and Ignition Workshops
- Bespoke research and intelligence
- Go-to-market activation and investment planning
- Voice Skill creation

To learn more about the ways OMD can support your innovation and marketing agenda or for a Fast Start introduction please contact:
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Authors

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Jean-Paul has been with Omnicom Media Group since 1995, working at Manning Gottlieb OMD in new media and futures roles, before moving to OMD EMEA in 2014. In his role at as Chief Product Development Officer, Jean-Paul leads the charge in developing and distributing our in-house platforms such as Omni, OMD Design and most recently the Fast Start Dashboard and was instrumental in the initial Retail Revolution research project.

Silvia Brunetti
Senior Manager, Product Innovation & Insights, OMD EMEA

Silvia recently joined the OMD team to work on the Retail Revolution programme of research. She's been leading on the dissemination of the Retail Revolution research as well as the development of several research streams with a focus on innovation and technology.
She brings a wealth of experience in research having worked both in the private and public sector. Driven by her lateral thinking capabilities she is committed to bring a fresh perspective to the media sector. Her goal is to help brands and clients understand the untapped potential of wellbeing design and positive technology.

Better decisions, faster.

OMD