

The Connected Traveler: How AI turns data into travel retail growth

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KEARNEY





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From recovery to connection: now comes the Connected Traveler

2023

→ 2026

Recover

Post-COVID reset

Adapt to returning traffic, shifting travel flows and changing shopper needs

Expand

From trinity to pentarchy

Bring airlines and media partners into the airport-retailer-brand ecosystem

Convert

The fight for relevance

Tailor offers and experiences to maximize dwell time and convert more footfall into purchases

Explore

New growth frontiers

Identify where to play and how to win in India and the wider APAC region

Adapt

Geopolitical resilience

Build resilience to geopolitical disruption, shifting travel flows and changing demand

Predict

Data and AI in action

Use data and AI to anticipate traveler needs and guide commercial decisions

Connect

The Connected Traveler

Connect pentarchy partners, data and AI across the traveler journey to drive travel retail growth



Travel retail faces its moment of truth: strategies to reinvigorate the marketplace



Travel retail's next chapter: innovating beyond technology key to regaining market momentum



The clock is ticking: decoding dwell time in the Asia Pacific travel retail industry



Ready for takeoff: why India's travel retail market is set to soar



The world in flux: Travel retail amid today's geopolitical realities



The Connected Traveler: How AI turns data into travel retail growth



Agenda

Win the Connected Traveler journey

Turn fragmented data into shared intelligence

Mobilize the ecosystem to scale commercial value

Our Connected Traveler Radar



800

international
travelers surveyed



20+

expert
interviews



100+

non-travel retail
benchmarks

Consumer research in
collaboration with

appinio

The **Connected Traveler** arrives with a **shortlist** shaped by **AI** and **social** media, uses the store to **experience** and **decide**, and **stays connected** beyond the purchase.

Let us follow the Connected Traveler along this journey.

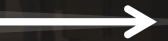
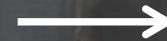
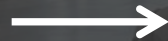
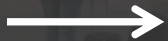
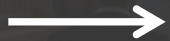


The Connected Traveler journey goes beyond the airport

Before travel

At the airport

Next journey



DISCOVER

DECIDE

EXPERIENCE

CONVERT

RETAIN

Earn a place on the traveler's shortlist

Discover

39% AI-influenced purchase decision
42% Gen Z | 21% Gen X

#1 Social media is the leading discovery channel

AI- & social-led discovery



Traveler shortlist



AI-native commerce

Uses AI to personalize discovery, making users >60% more likely to purchase



AI-led discovery

Adapts content, products and brand visibility for AI discoverability



Social advocacy

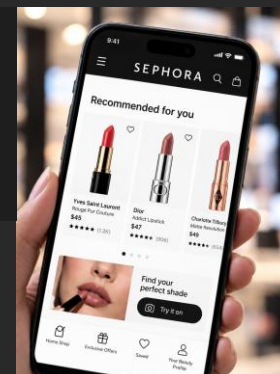
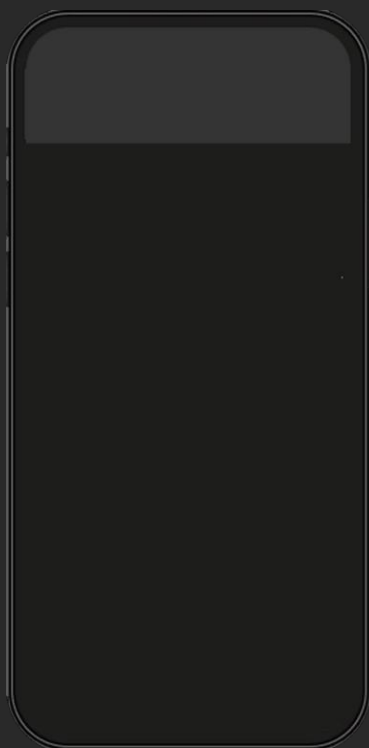
Scale to ~300k creators and 50% media spend on social – main driver for AI-visibility

Turn the shortlist into a deeper consideration

Decide

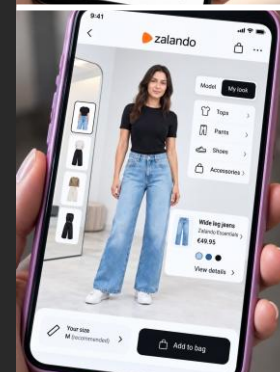
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49% Compared airport prices to online / downtown



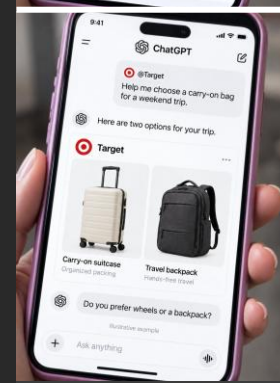
SEPHORA

Recommends products tailored to shopper's beauty profile



zalando

Visualizes clothing fit on a personalized 3D avatar



TARGET

Shopping app inside ChatGPT for AI-native discovery and purchase

Prepare the physical store for demand and optimize live

Experience

1 Equip staff with AI-insights

Guide staff with live product, stock and traveler intelligence



Selected examples



2 Prepare operations for demand

Adapt staffing, inventory, and promotions to expected demand



3 Measure & optimize execution

Leverage footfall, dwell and behavior insights



Have you used a digital or AI-enabled in-store experience?

CURRENT ADOPTION

50%

Already have



FUTURE INTEREST

82%

Would like to in future

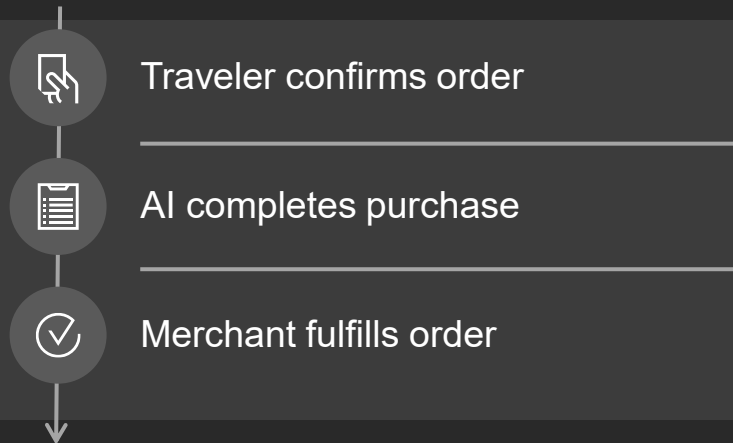
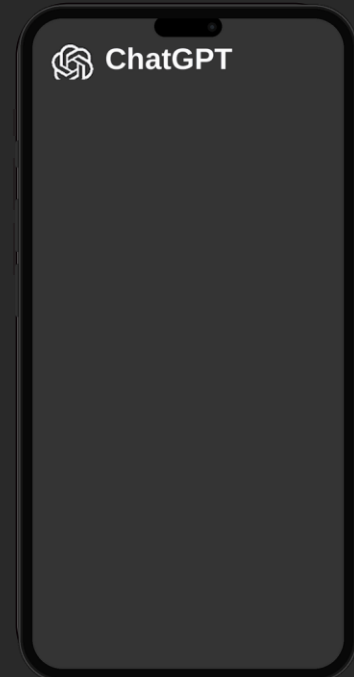
Convert by adapting fulfillment to time and place

Convert

68% of airport buyers are receptive to both AI-assisted transactions and reserve & collect

AI-enabled purchase

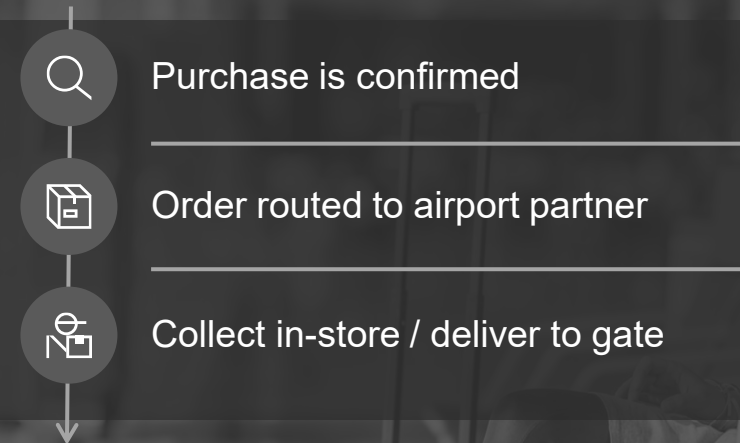
1



Google Qwen Tmall 淘宝网 Taobao.com

Journey-aware fulfillment

2



adani blinkit DUBAI AIRPORTS مطار دبي

Carry traveler memory forward through frontier loyalty

Retain

86% would join a free loyalty program recognized across airports and airport shops

#1 Personal discounts are the strongest value exchange for data sharing

Personalize through AI-memory 1

For consented consumers, leverage saved preferences and real-time context to deliver hyper-personalized recommendations



AI-memory

ChatGPT builds consumer memory across conversations unlocking true personalization



Re-engage in anticipation 2

Predict next buying moment and initiate timely outreach to encourage follow-on purchase on next trip



Predict repeat purchase

Uses purchase history and predictive AI to time personalized content



Extend loyalty across partners 3

Provide a single loyalty identity with benefits across multiple brands, retailers and partners



STARBUCKS

7-ELEVEN

One identity across partners

In Hong Kong and Singapore, yuu is one loyalty currency across selected brands



Travel retail sees demand coming, fragmented data limits value

The advantage

Tomorrow's travelers are already visible.



What volume and quality of traffic arrives?

≠

The challenge

Data remain isolated across the ecosystem.



Airline



Airport



Retailer

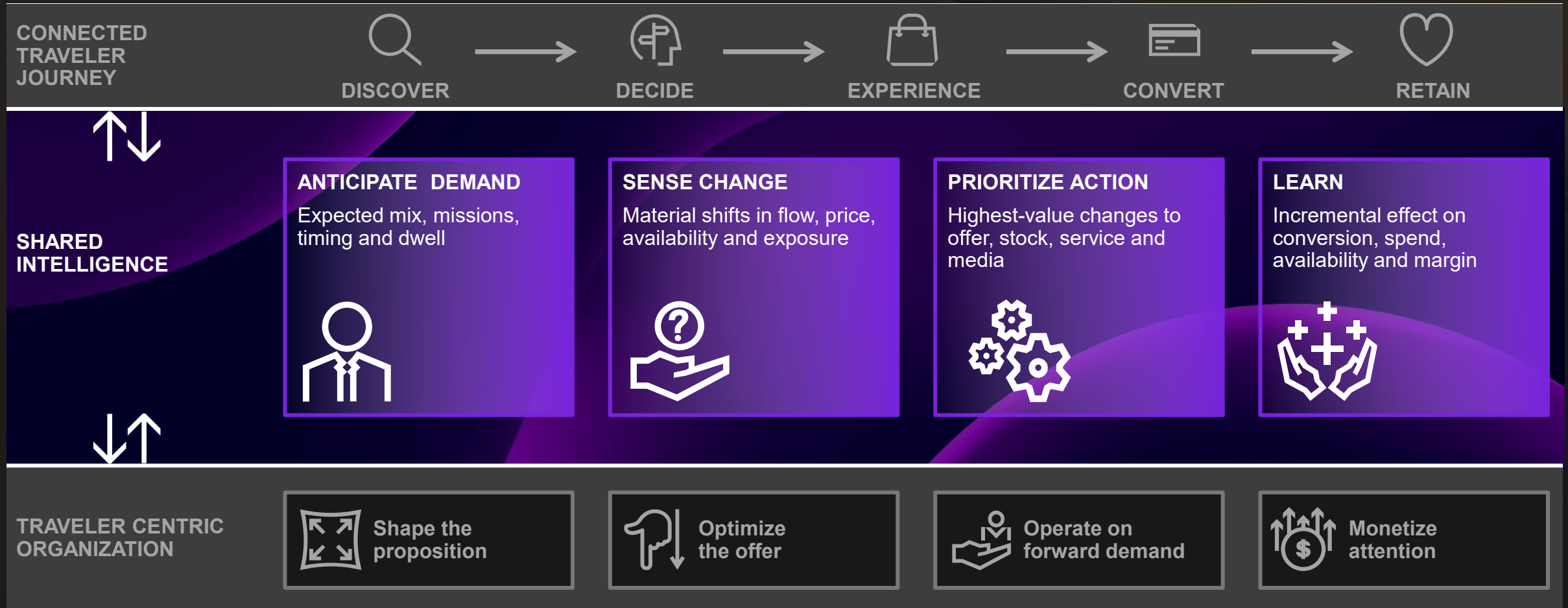


Brand



Media

Shared intelligence links the traveler journey to the organization



Build shared intelligence to shape better commercial decisions

PROPRIETARY STAKEHOLDER DATA



Traveler

- Demographics
- Needs
- Behavior



Airline

- Itinerary
- Passenger mix
- Delays



Airport

- Timetable
- Gate
- Dwell



Retailer

- Assortment
- Price
- Promotion



Brand

- Demand spaces
- Product
- Engagement



Media

- Exposure
- Attention
- Response



EXTERNAL SYNDICATED INTELLIGENCE



SHARED INTELLIGENCE TO ANSWER COMMERCIAL QUESTIONS



Demand forecasting



Next-best action



Reinforcement learning

Leading players already translate shared intelligence into impact

COMMERCIAL
QUESTION



Does media exposure increase sales of the brand at the retailer?



BRAND

First-party audience data

Identify relevant audiences for beer drinks with travel occasions and timing



MEDIA

Campaign exposure data

Match brand's audiences with viewers and measured advertising exposure



RETAILER

Purchase data

Link exposure to actual purchases to measure incremental sales



Shared data
collaboration



OUTCOMES



Incremental sales



Improved media ROI

Data sharing scales through clear value proposition for partners

Three commercial models for data sharing

Pay

Buy privileged intelligence

- > Pay for access
- > Pay for usage
- > Pay for activation
- > Pay for outcome

amazon



Buy shopper signals to identify households and activate targeted campaigns

Exchange

Share complementary assets

- > Exchange audience data
- > Exchange loyalty data
- > Exchange transaction data
- > Exchange demand data

Walmart



Combine retailer sales data with brand insights to reduce inventory and accelerate replenishment

Co-Invest

Fund data capability together

- > Share operating cost
- > Share technology cost
- > Share data insights
- > Share commercial returns

Carrefour



Jointly fund and operate a shared retail-media and data platform at scale



**Every ecosystem player has a distinct role.
How can you start now?**

Pentarchy players unlock growth by connecting the journey

Airports

Share **passenger-flow** and provide the physical estate for partners to **scale innovation**

Carriers

Share **booking, loyalty and traveler insights** for early visibility into **traveler demand**

Brands

Create **early desire** and make offers **discoverable** in AI and social media

Digital & Media

Display **personalized content** across the journey and **measure media ROI**

Retailers

Translate **demand** into relevant AI-augmented retail experiences



Thank you

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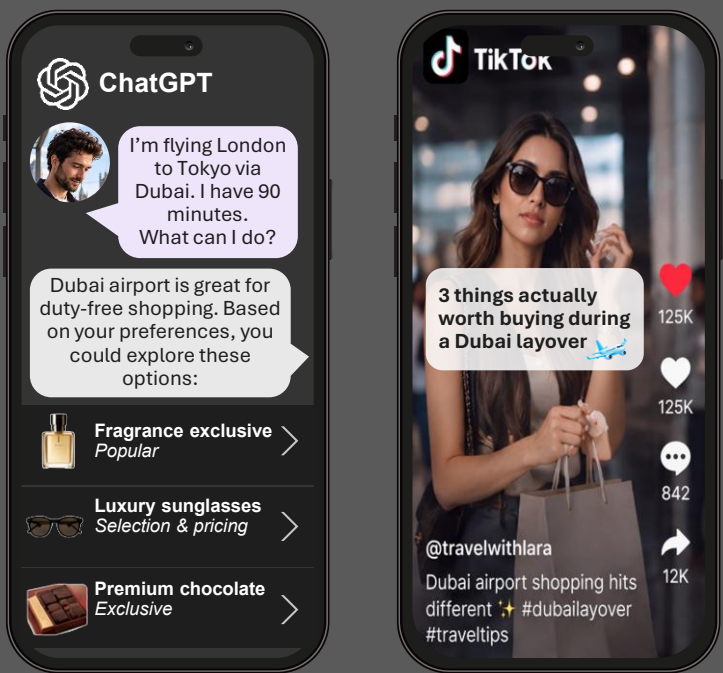
Earn a place on the traveler's shortlist

Discover

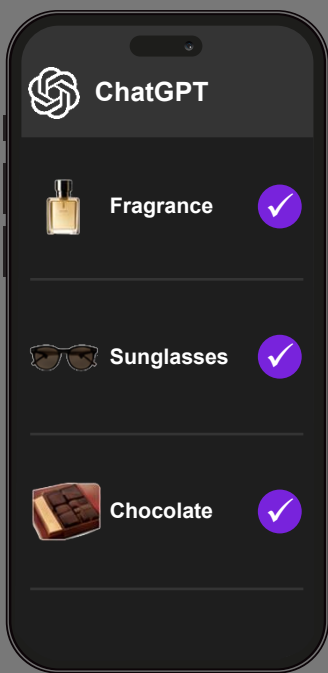
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72% Gen Z | 43% Gen X

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AI-visibility

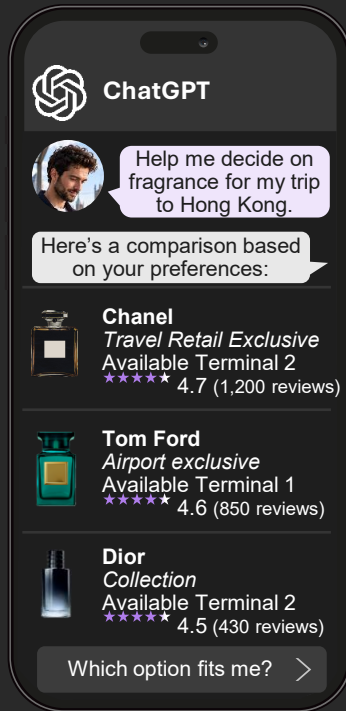
AI visibility intelligence – social (14%) and third-party (48%) content matter most

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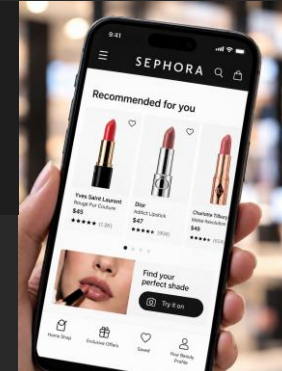
✈ Is this a Dubai exclusive?

🛍 Is the price lower than downtown?

🏗 Is it available at my terminal?

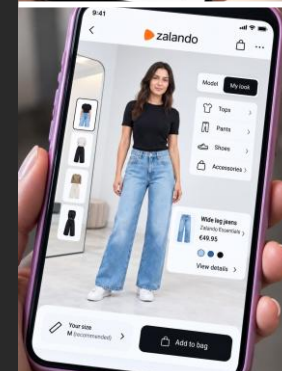
★ Summarize the reviews

⚙ Which is the best option for me?



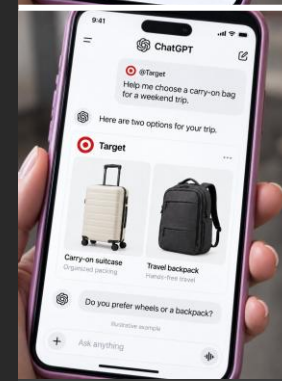
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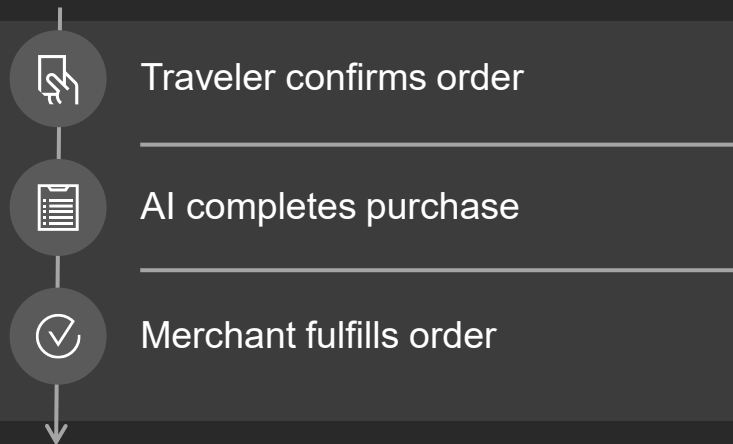
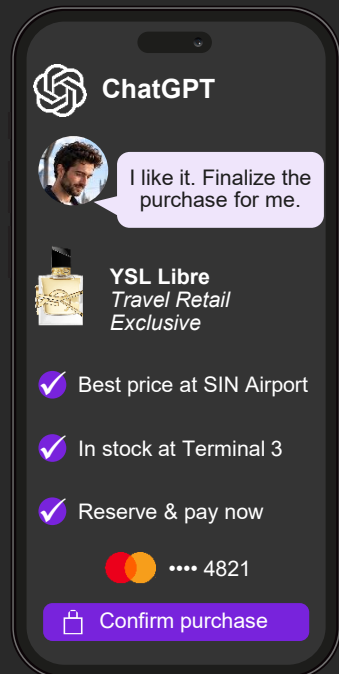
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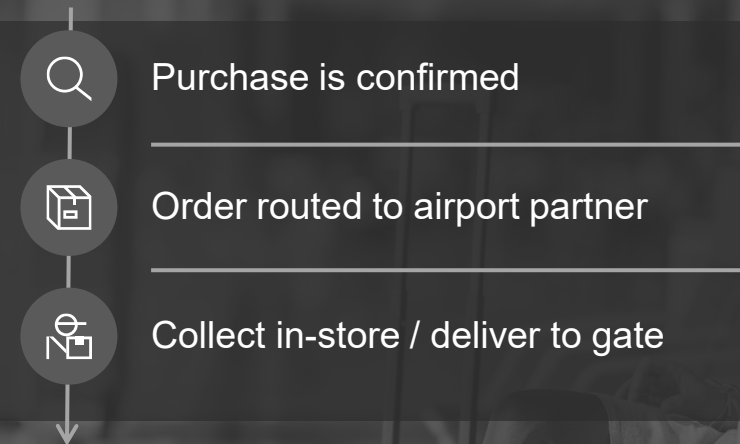
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Google Qwen Tmall 淘宝网 Taobao.com

Journey-aware fulfillment

2



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