The Influence Codes

CHAPTER 02:

Travel

The Influence Codes

Table of Contents

Defining influence in the 21st century.

A *quick recap of the influence codes.*

This is the second report in our series examining how influence works in the modern world. In our first release on this topic, we focused on the macro themes that shape 'how' influence has changed and works. In this release, we will focus more deeply on 'what' influence now looks like, through the lens of the travel category.

If you haven't had the opportunity to read our first report, or if you are simply looking for a quick recap...then the following should serve as a 101 on influence in the modern context.

What is influence?

Influence is the intentional (and sometimes unintentional) effort to affect the attitudes and behaviour of an individual or group, through the provision of stimuli or conditioning.

There are 4 main components to influence. They are Information, Authority, Community and Affinity. Information that was rare or sacred was influential because of the outcomes it could deliver. Authority that was vested in individuals or institutions was influential because they often were the repository of information, or guidance that we could trust and have faith in.

Community represents the behaviours and attitudes we would see amongst those with who we shared physical and ideological space with. And finally, Affinity is the comprised of the behaviours and attitudes of the people that we like or would like our lives to be more like.

Historically, influence worked in a 'top-down' fashion. Those who were in a position of authority or who held privileged information, had the ability to influence others through their communication and actions.

It is important to recognise, that influence has always played a pivotal role in our lives. In fact, for thousands of years we have looked for signals from others to help influence our decisions. Considering that the public needed knowledge or guidance on how to navigate through the complexities of life, the 'top-down' method of influence was readily accepted.

As such, Information and Authority have traditionally been the most potent sources of influence. However there have been substantial shifts in both culture and our environment that have redefined how Influence now works.

3

Defining influence in the 21st century.

The shifts that have created the modern context.

The first major factor to consider is that we no longer live in a time where information was scarce. We live in an era of information overload. With so much information available, from a myriad of different sources, it is now harder to determine what information is useful and which source is an appropriate authority to listen to.

Secondly, the signals or 'culture codes' that were once very clear in our world are now much harder to find. We now live in a 'codeless culture' where conventions are constantly changing. This has made it harder for all of us to recognise and understand how we are expected to respond to the world around us.

Thirdly, Australia used to be a country defined by a level of deep institutional faith. We believed that the institutions had out best interests at heart and would therefore be advocating in a way that leads towards better outcomes for us all. In recent years, corruption, negligence and moral decrepitude have all eroded our faith, leading us to look towards other sources of guidance and influence.

Whilst the three previous shifts are cultural, the fourth is environmental. And that is the explosion of choice. Every day, we are faced with an increasing number of choices, options and variables. The number of products, services and amenities available to us is increasing at an exponential rate. Whilst increased choice was thought of as a benefit to the public, the reality is that has created more pressure and anxiety for us to make the right decisions.

The modern context for influence has been defined by these significant shifts.

4

The *four major themes of influence* in the modern era.

In a world where it is harder to define what Information is credible and which sources of Authority we can rely upon, the way we interrogate our decision-making has changed.

With so many decisions needing to be made, we simply don't have the mental bandwidth to rationally process who or what to pay attention to. As a result, we have started to look for alternative signals to help us choose. And rather than waiting for influence to come to us...we are actively seeking it out instead. Meaning the model has flipped. Influence is now occurring from the bottom up.

In this new dynamic, Affinity has emerged as the most potent of all influence factors. And it is understandable. Each decision we make has the potential for damage to our ego. Our bias towards loss-aversion means that we are looking for shortcuts to help us decide what to do in

THEME 01

From Authority to Affinity.

The power that shapes consumer choices has drastically shifted away from Authority, towards affinity. This means, the traditional or established opinions from what may be seen as subject matter experts is no longer a potent force for creating behaviour change.

Rather than being influenced from the top-down, influence now works 'bottom-up'. This means that Australians are looking to select their own sources of influence, guided by who they hold Affinity for.

THEME 02

The opportunity for influence is during high cognitive load moments.

Contrary to marketing theory that suggests the optimal time to build brand preference is during uncluttered and calm moments of high receptivity, the reality is that affinity provides the opportunity to ease the decisioning process precisely at a time of high stress for consumers, where receptivity is deemed to be low.

This means that brands have the ability to make it easier for people to choose them, if they can show up at the times where the consumer is being placed under mental stress.

THEME 03

The 'Goldilocks' zone.

High reach doesn't equal resonance. Especially when it comes to individuals or so-called 'influencers'. Interestingly, there is a sweet spot for who we chose to allow to influence us, and this is specifically driven by the characteristics that define what high Affinity represents to us.

One of the core characteristics of Affinity is relatability. What this means is that unless you share ideological, physical or social space with your target, you won't hold any power to influence them.

THEME 04

You don't have to be rigid with brand tone.

Most brand custodians will acknowledge the importance of 'consistency' in the way their brand shows up in the world. As a result, brands maintain a rigid tone, even when the decisioning context for their customers changes. But this needn't be the case.

Depending on what influence outcome you seek, different brand postures can be utilised to grow and develop Affinity with your customer base. This means that you can flex your brand tone, as long as it aligns with your influence goals.

Influencing Travellers in 2024,
Key Insights:

01 *Travel isn't about escape from the day to day...it's about immersion in what you love.*

02 *This has created more pressure for each trip to be perfect.*

03 *Influence sources need to be authentically reliable, above all else.*

Today's traveller is no longer looking for an opportunity to escape from the day to day. Instead, travel provides the chance to fully engage with their passions in life. This means that cookie-cutter experiences will no longer cut it, as today's travellers are looking for something far more unique and personal. This fundamental shift has swung the balance of influence away from Information and Authority, towards Affinity.

However, given the risk, complexity and ultimate costs associated with travel, audiences are looking to sources of influence to ensure they 'don't go wrong', even more than they are looking for

guidance on how to 'get it right'. For this reason, Authority still matters, but in a slightly different way. Experience and reliability are the key components that are required to build influence in the category. And whilst those characteristics may take a long time to establish in other category verticals, audiences will more readily accept them (if they are signalled effectively) in travel, especially when they are under pressure to make decisions.

For marketers in the travel industry, there's useful lessons to be learned. Especially regarding the relatively low effectiveness of information to build influence. In fact, Audiences are bemoaning that

there is too much information and complexity in the category. As a result, they are seeking out influence sources that quickly showcase the outcomes (and not necessarily destinations) that they are looking for.

Post-covid, and amidst a cost of living crisis, Australians are still willing to spend big on travel, but this has only increased the importance of each trip to be deeply fulfilling in a unique and personal way. Whilst many Travel brands have failed to adapt to these new needs, both Travel Agents and Cruise liners have effectively leveraged modern influence to grow their business.

6

PART 01

How influence works in travel

The Influence Codes

Influence in travel used to be *driven by authorities* with information about destinations.

Historically, *the most powerful influence lever in travel was information.*

This made sense, given that anyone who was about to travel to a foreign destination, would undoubtedly want to know more about what they were going to experience there. For this reason, Information was the tool they required to feel more confident in their decision-making process.

Before the internet or social media, travel information was rare and privileged.

Travel Agents, Guide books and TV Shows were the authorities we trusted to pique our interest in new destinations and give us the necessary knowledge we required. That *information came in a predominantly binary fashion: destination imagery and travel guidance.* Specifically, show me what I can expect there, and help me make the most of my time there too.

As a result, the way the *travel industry influenced has looked and felt remarkably similar for over a century.*

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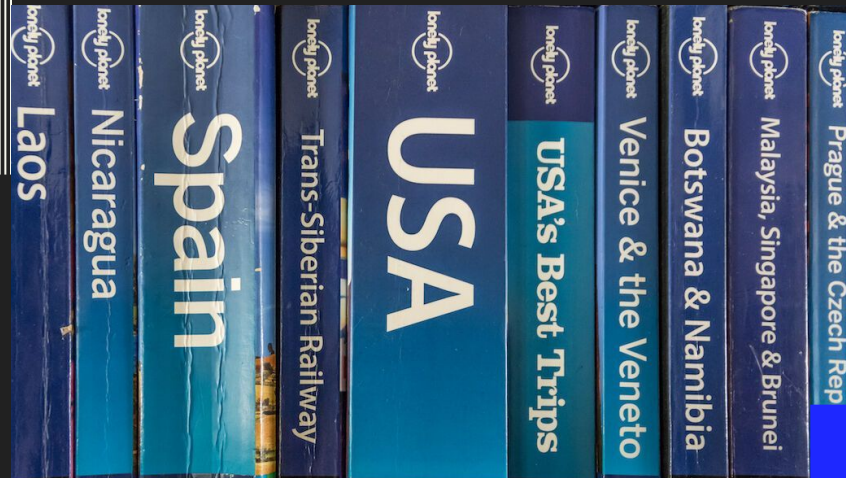
The *world was big* with limited access; *now it's smaller* with limitless access.

If travel wasn't habitual or domestic, our need for information sources we could rely upon meant that certain voices (and even brands) of Authority were highly influential. Unfortunately, *the nature of Travel influence was 'top-down',* communicating information from a single, specific source of Authority...to the masses. This
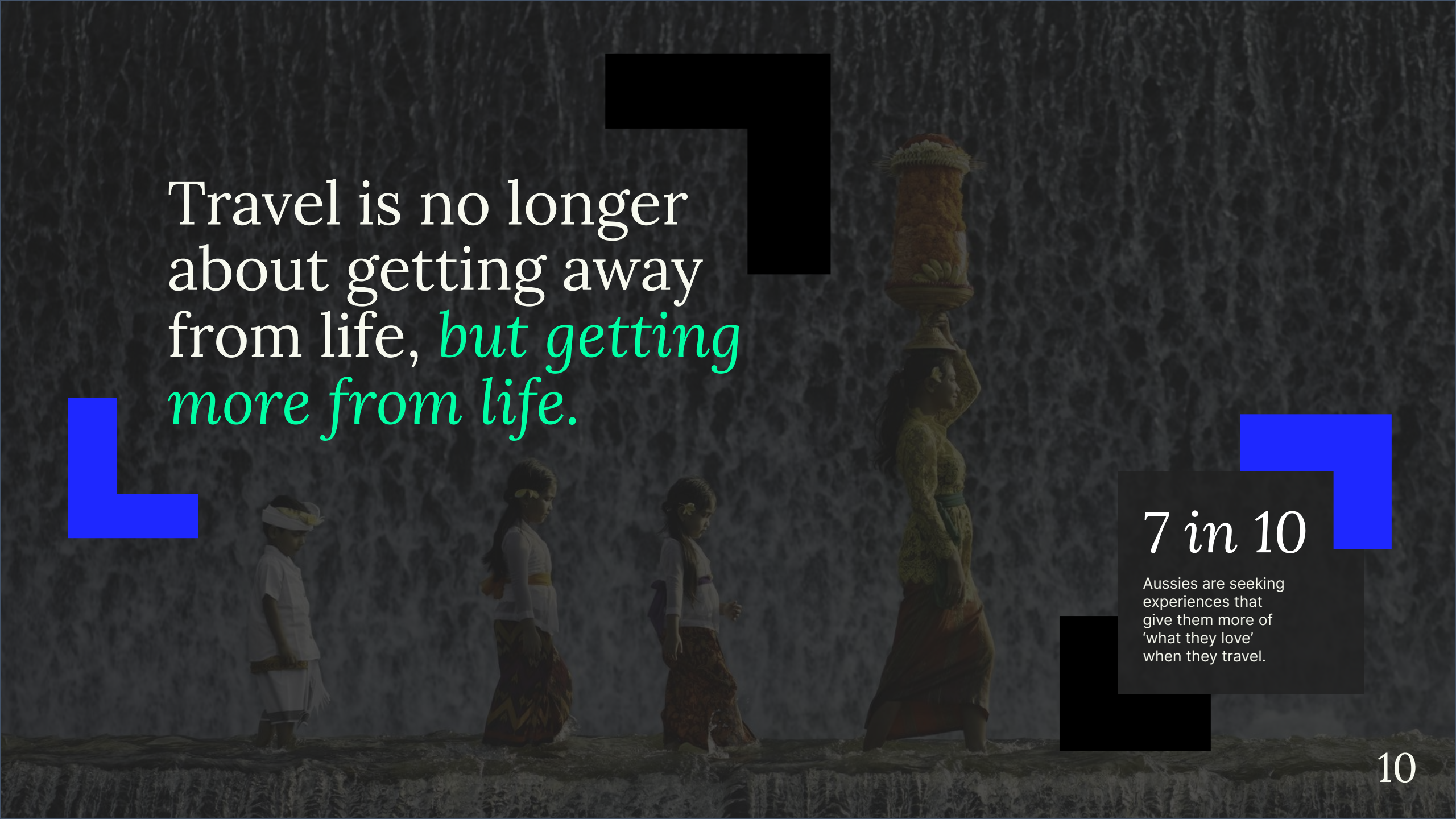
'one-voice-to-many' discourse *treated all of the audience in exactly the same way.* This meant travel influence was consistently typified by a 'lowest common denominator' approach, designed to satisfy as many people as possible.

However, as travel information has become more accessible,

the reverence we had for Authority has begun to dissipate. Rather than relying upon the experiences and opinions of sources whose narrative was designed for all, we can now viscerally share in the journeys of specific peers who share our mindsets and interests...and we can do this in almost real-time.

Travel is no longer about getting away from life, *but getting more from life.*

7 in 10

Aussies are seeking experiences that give them more of 'what they love' when they travel.

For travellers the risks of *'getting it wrong'* is larger than ever.

As our desire for enriching and fulfilling travel experiences grows, *the pressure for every holiday to now be 'the trip of a lifetime'*, is increasing the need for audiences to ensure that everything goes right. This consumer context is especially important now, because as the cost of living stresses increase, so too does the *relative importance of travel decisions.*

For many Australians, travel may be one of the largest single expenditures they will make each year, heightening the stress and anxiety to make the right decisions.

This is exacerbated by the conditions we now face in the 'cost of living' crisis, because we all want to make the most of our precious vacation time, *and so the importance of Authority, to help us avoid the pitfalls has increased greatly.*

Half

of Aussie travellers agree that that 'A big downfall about picking a holiday or activity option is the experience not living up to what I had personally hoped for'.

Travellers are looking *beyond tired old clichés.*

Despite the shift in audience mindset, the travel industry and travel journalism continues to deliver clichés.

And those *clichés are waning in their power to influence.*

In failing to respond to the emerging demand for more personal experiences, the travel industry is still *guilty of pigeonholing audiences into generic types of holidays.*

Rather than focusing on destinations, the industry may be better served by building a conversation around the outcomes that destination may deliver. In other words *travelers are seeking 'internal' rather than 'external'* destinations (for more on this read our 2023 Travel Distilled report).

So, rather than showcasing a classic tropical beach destination ... the real power to influence lies in building a connection with the desire for relaxation, introspection or exhilarating experiences that a beach can provide.

Beyond just destination, seasoned travellers in particular, are seeking more from their travel. *The old paradigm of two weeks away is being replaced* by longer, often multi-location vacations, flexible work-cation travel arrangements, and with it a raft of new demands and expectations and more complex itineraries.

Here, again, the transactional 'flights, transfer and hotel' interaction traditionally offered by the industry is, for the most part, slow to respond.

2 in 5

Aussie travellers say 'Travel brands and providers are providing options that are too generic for the personal experiences I am seeking'.

In this context, other voices are *disrupting* the top of the travel funnel.

Particularly at the top of the conversion funnel, voices that talk about *the passions they pursue in a given location are more influential than traditional travel authorities.*

Experiences are driving consideration of destination, *disrupting the traditional 'destination first'* model. So for rock climbing enthusiasts, Shauna Coxsey's social media feeds would provide a stronger and more personal motivation to consider travel to Switzerland, that the national tourism board's latest campaign.

Moreover, these *new sources of influence can readily be engaged with* to ask questions, ascertain relevant information and are seen to provide a more authentic, believable voice in response.

For the travel industry this means *the top of the funnel is being disrupted.*

New, more powerful voices, that directly address the experiences people want more of, are *exerting influence at the consideration and conversion stages of travel planning,* where the industry has traditionally been slow to convert.

I need the perfect shot.

Switzerland.

I need Switzerland.

13

The successful response is to tap into *affinity and evoke the experiences people are seeking in travel.*

In response to this changing dynamic, *a new approach to creative* is delivering the cut through and commercial impact that brands increasingly require.

Analysis of the 250,000 campaigns in Kantar's LINK database shows that the tourism campaigns with the *greatest differentiation and commercial performance are those that score highest for affinity.*

Consistently, they do this not through reminding people of the destination itself, but through evoking the experience that people will have by being in the location.

Fill your heart with Ireland.
Top 10%

TAS the off Season
Top 2%

Tourism NZ
Top 1%

PART 02

How travel brands can build influence with their audiences

The Influence Codes

# There are *four fundamental ingredients* of influence.

Synthesising the academic work from the 1950's until now, shows that there is a consistent, fundamental set of ingredients for influence.

Historically, *Information* and *Authority* were the most potent sources of influence. However, there were also two other components.

Community represented what people saw as accepted practices, behaviours and schools of thought within the groups and communities they were part of. These communities were predominantly geographically defined.

Affinity represented the final ingredient. We would look to our friends and family and those we liked or wanted to be like, to look for the signals we needed to make decisions.

01

Information

02

Community

03

Authority

04

Affinity

16
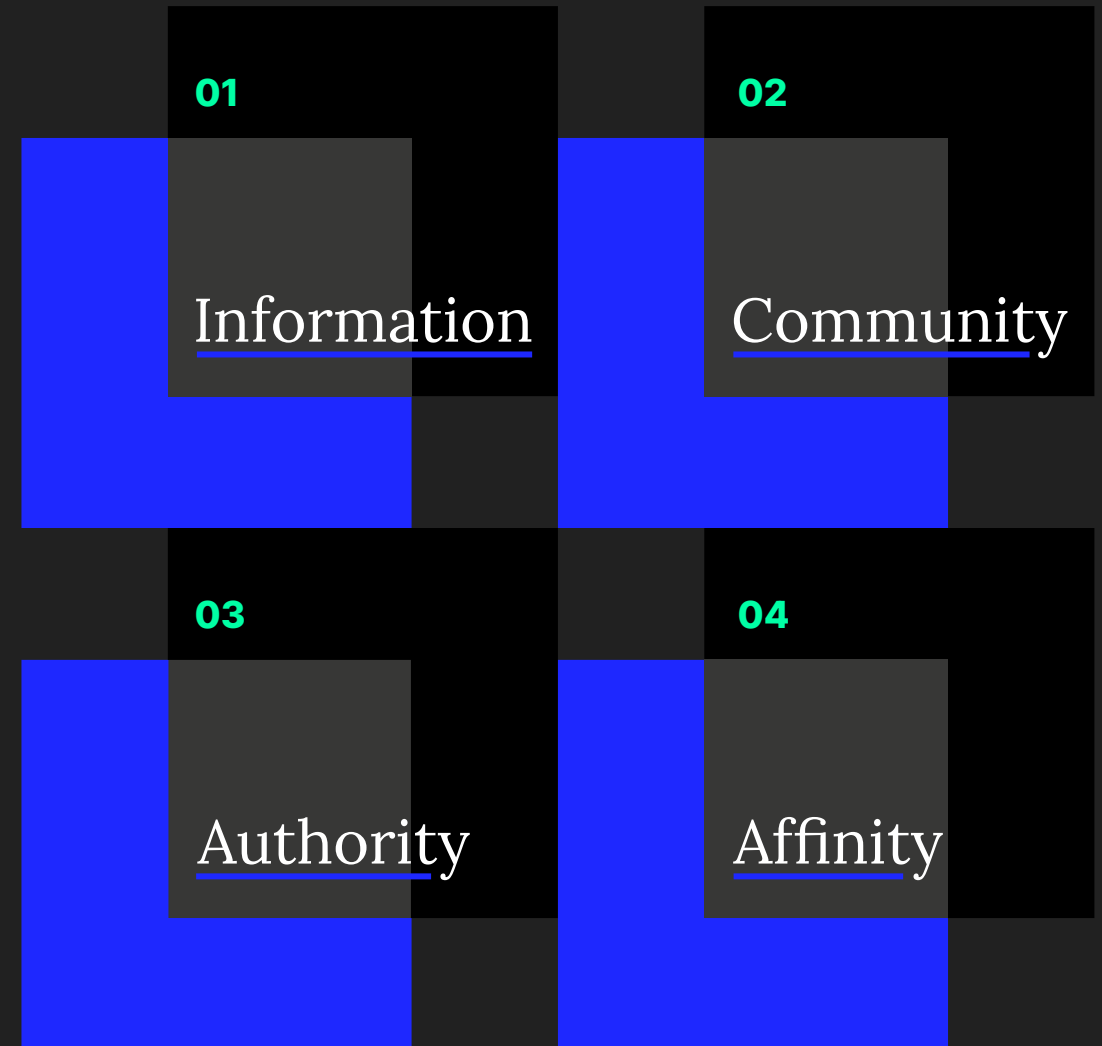
Influencing travellers is different than trying to influence people in any other category.

Influence in travel is defined by two key dynamics; high emotional importance of decisions and low frequency with which they're made.
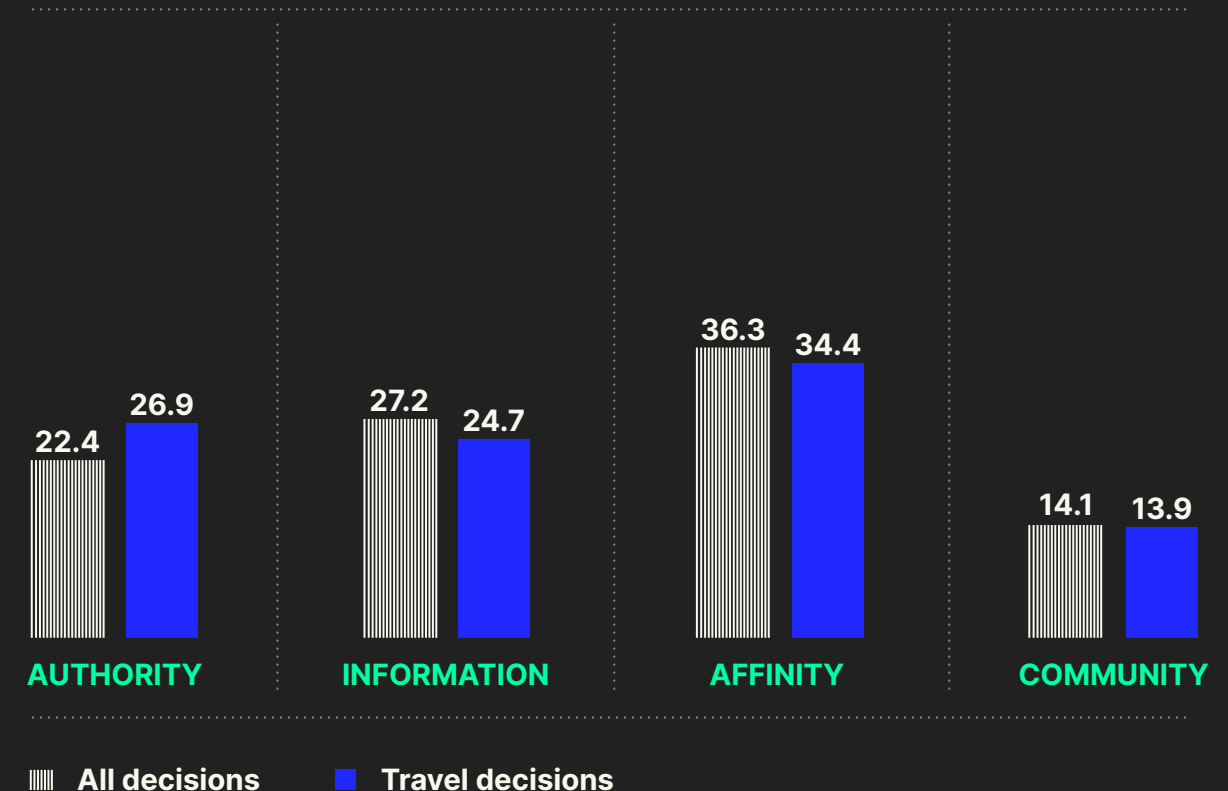
Given how personal we want our travel experiences to be, we are now looking for influence sources that keenly understand us and are attuned to our needs. Audiences aren't looking for what's unilaterally regarded as the best. They are *looking for what is best for themselves.*

So, increasingly we are looking for influence that comes from places that are *aligned with our passions and desires.* For this reason, *Affinity still reigns supreme* in the levers of influence.

But travel decisions are not ones people make regularly. Accordingly, confidence in making the 'right' decision can often feel more elusive. Given the emotional and financial risk of 'getting it wrong', *Authority carries greater importance* in the context of the influence in the travel category than it does in broader culture.

Information remains important, but plays a less significant role in travel specifically than in broader decisioning, reflecting both the overload of travel information and the greater reliance on the voices of authority that can bring confidence to the decisions we make.

Share of influence in *travel vs. influence* in overall decision making (out of 100)

	All decisions	Travel decisions
AUTHORITY	22.4	26.9
INFORMATION	27.2	24.7
AFFINITY	36.3	34.4
COMMUNITY	14.1	13.9

All decisions   **Travel decisions**

The good news is that *there are shortcuts to influencing travellers* not available to brands in other categories.

To wield influence in travel, you don't need to have developed a relationship with the audience over a long period of time. Especially when they are faced with quick fire decisions that carry high risk. Instead, having the ability to quickly showcase reliability and authenticity builds relevance, whilst increasing affinity and authority too.

Clear signalling of experience, coupled with relatability are critical to quickly build influence over audiences in high risk scenarios...

SO how do you do it?

18

There are four factors that drive outsized influence for travellers.

AUTHENTICITY & RELIABILITY

EXPERIENTIAL AUTHORITY

COMPARATIVE INFORMATION

RELATABILITY

In travel reliability and authenticity are together the most powerful force, *with 2.8 times more impact than an average influence factor.*

Being 'the real deal' and someone I can count on provides reassurance on avoiding disappointment.

Experiential Authority supports Authenticity with tangible, relevant authority. *This has more than twice the impact* on travel decisions than average.

Being able to talk from experience, more so than a title, creates influence in travel

The right information in the right form is vital, with *comparative information being 1.7 times more influential* than average.

Information that limits complexity and makes choices simple is the currency in travel

Relatability is the final of the key factors in influence, being 1.4 times more impactful on average.

The feeling that I have been heard and my circumstances understood is vital to making the right choices for my travel

Be a source that consumers can rely upon.

Considering all factors, Authenticity and reliability is almost 3 times more important than anything else.

With cost, the weight of expectations and the potential damage to ego all on the line, it is clear that we need our sources of influence to be something we can rely upon to deliver consistently.

The importance of Authority (and relative experience that comes with it) provides audiences with a certain level of comfort.

However, when it comes to travel, authenticity and reliability, are the most powerful components of influence. So if you want to build influence, you'll need to be 'someone I can count on'.

How to build authenticity and reliability with travellers.

WHAT TO DO

01 Establish your credentials through experience relevant to people's travel aspirations.

02 Show successful outcomes you have delivered for others when they needed it most.

03 Ensure you deliver this in a way that feels relevant to people's individual travel aspirations in order to build affinity and credibility.

WHAT NOT TO DO

01 You don't need to share aspirations, values or even be liked by your audience for them to feel you are reliable,these are less effective.

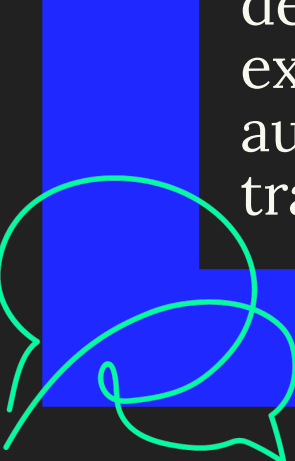**02** Waste time and energy trying to build a connection that people aren't seeking.

20

Help audiences *‘get it right’* by providing experiential authority.

The second most important factor is 'experience', which is twice as effective to influence people in travel than in other decisions.

As we look for more opportunities that give us the experience of life we seek, authority naturally becomes a more important factor in influencing decisions.

But official titles, reviews and other endorsements aren't as powerful as an authentic display of experience.

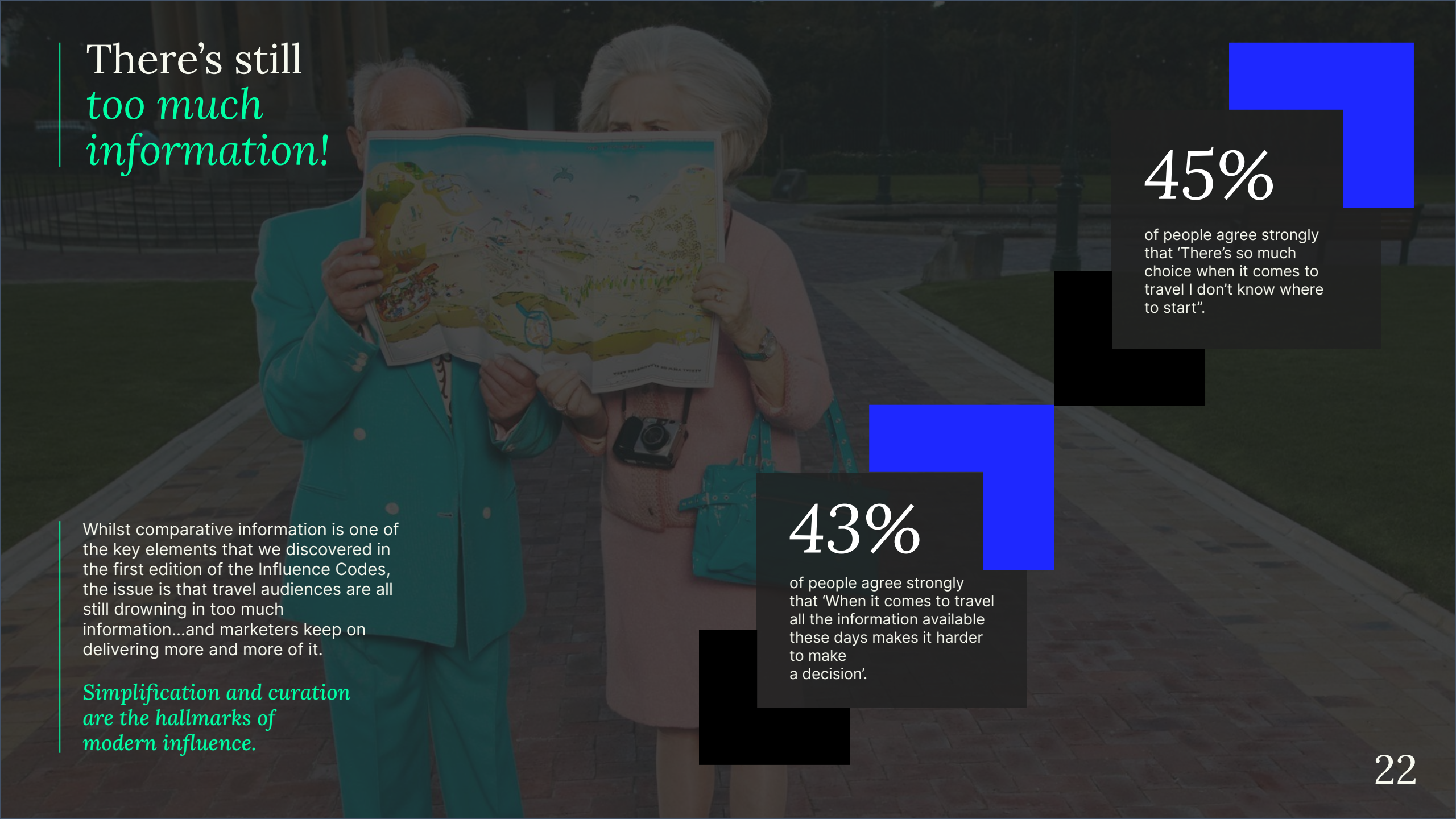## How to demonstrate experiential authority with travellers.

WHAT TO DO

Seek out opportunities to display the experience you have in a way that connects with your audiences current and their future needs.

01 There is no substitute for experience, either your own personally or that of the network and brand you're representing.

02 Leverage this previous experience, through reviews, recommendations and pre-existing media relevant to the consumer decisioning context.

WHAT NOT TO DO

Earned positions, titles and social endorsements all under-index in delivering influence.

01 So don't build your character and credentials via a third party recommendations or independent benchmarks.

02 Equally, don't rely on your title or position to build your authority in the eyes of consumers.

21

There's still *too much information!*

Whilst comparative information is one of the key elements that we discovered in the first edition of the Influence Codes, the issue is that travel audiences are all still drowning in too much information...and marketers keep on delivering more and more of it.

Simplification and curation are the hallmarks of modern influence.

45%

of people agree strongly that 'There's so much choice when it comes to travel I don't know where to start".

43%

of people agree strongly that 'When it comes to travel all the information available these days makes it harder to make a decision'.
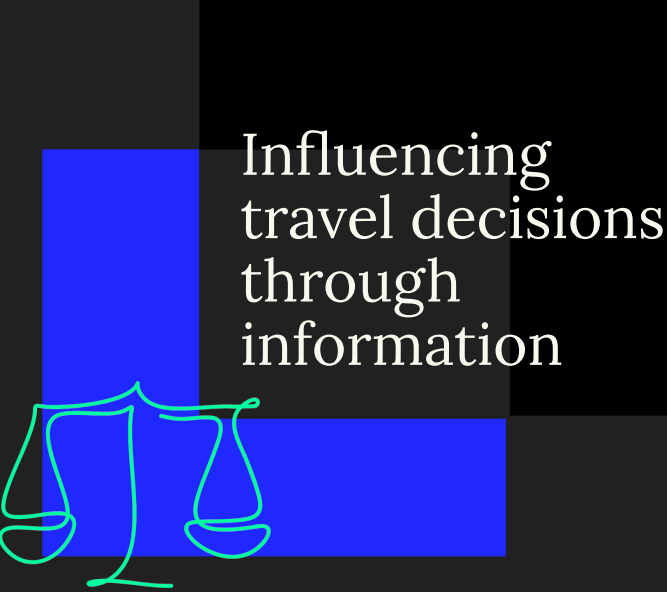
Provide the comparative options that *ease the decision-making process.*

The role of information in travel decisions is overwhelmingly to simplify the decisions that are right for me.

Information that requires more engagement or mental effort on the behalf of the individual is less influential. Whilst rare or unique information is sought, by far the most powerful driver of influence is the comparative details that help reduce complexity of options to a simple choice of the best option.

In the travel category people are most interested in comparative information, which is 66% more influential towards choosing their next trip compared to other decisions they make. Also important are reviews, and privileged information, particularly when the stakes or risks are high.

Influencing travel decisions through information

WHAT TO DO

Provide just enough choice for Audiences to feel confident and in control by contrasting it comparatively.

01 Show understanding of consumer aspirations by presenting options that are relevant to their travel aspirations.

02 Ensure information offer options, easing the complexity of decisions and guiding action rather than more thinking, and with it confusion.

WHAT NOT TO DO

Demonstrations and benchmarks are less helpful for audiences trying to choose than simple comparisons. So, don't try to satisfy everyone by providing too many options.

01 Avoid information that requires effort from consumers to understand or to have explained to them.

02 Demonstrations, benchmarks, and reviews all require mental effort from consumers, making the decisioning process more complicated and, often, uncertain.

23

The shortcut to affinity with travellers is *making them feel 'heard'*.

Vital to the influence formula in travel is the feeling of being heard. The feeling of being understood, that individual aspirations and circumstances have been recognised, is key to building influence.

Unlike in broader 'cultural' influence, this doesn't require longevity of relationship. It needs to be demonstrated in the moment.

Personal connections, shared values and attitudes, and being likable, admired or respected are less important in influencing decisions. Offering selfless advice, based on the feeling of being heard and understood are what truly matters in create affinity and exert influence.

Be a good listener!

WHAT TO DO

Find the earliest opportunity to let your audience define the experience they are looking for. The character of relatability requires the ability to understand the experience they are looking for. This has been a key component of the enduring appeal of travel agents.

WHAT NOT TO DO

Don't be too quick to try and establish a likeable character before you know and understand what the audience wants, Especially don't try to offer solutions or advice before it is solicited.

01 Don't' seek to be understood, liked or to establish deeper sense of relationship or affinity with people. None of these are helpful.

02 You don't need to be liked, you just need to listen.

Authority and Affinity are powerful for younger generations, and even more so for older generations.

Whilst *Affinity and Authority* remain the key factors of influence across all generations, they both *become progressively more important as generations age.*

So too, *community* and (to a lesser degree,) information, *are more important factors in influencing the decisions of younger generations*, particularly Gen Z.

For older generations, with more entrenched travel behaviours, reliability, relatability and experiential authority become more important in meeting their emerging needs in travel.

Conversely, for younger digital-native generations, there appears to be more confidence in navigating sources of influence through expert reviews, social endorsement and community factors (where they consistently over-index against other generations).

Irrespective of whether their younger life-stages may afford more time to indulge in exploring travel options, or their relative lack of experience in travel may mean they seek more validation, the implication is clear:

Younger Australians are further removed from the traditional model of influence in the travel industry, and influencing their decisions requires more radical disruption to it.

How the fundamental ingredients of influence differ by generation
(% decision making / index to 100)

	AFFINITY	AUTHORITY	INFORMATION	COMMUNITY
GEN Z 18-27	32%/94ix	27% / 100ix	25% / 101ix	16% / 114ix
MILLENNIALS 27-43	33% / 98ix	26% / 96ix	26% / 103ix	15% / 106ix
GEN X 44-59	35% / 103ix	27% / 102ix	25% / 99ix	13% / 91ix
BOOMERS 60+	36% / 106ix	28% / 102ix	24% / 96ix	13% / 89ix

25

Risk and complexity change the influence blueprint for travellers.

'Travel', is a broad church. There are multiple types of vacation associated with a variety of different types of journey. From weekend mini-breaks down the coast, to year-long round the world trips of a lifetime.

Similarly the decisioning moments vary from the pre-planned and considered, through to the spontaneous and in-the-moment.

Unsurprisingly, *the influence blueprint changes depending upon the levels of complexity and the risk associated with getting the decision wrong.*

The four key elements of influence (Authenticity &

Reliability, Experiential Authority, Comparative Information and Relatability) remain paramount across these.

But their relative importance, and that of secondary influence attributes, *change as levels of complexity and risk vary in and across different decisioning contexts.*

Tailoring influence to the risk/complexity context is essential.

HIGH COMPLEXITY

LOW RISK HIGH COMPLEXITY

Seek to create personal, proximate affinity.

The situations where people are comfortable making autonomous decisions. Building affinity through your character is the key to successfully influencing consumer decisions.

In these situations, people are seeking clear guidance and ready solutions. Here, above all other scenarios, experience, authenticity and reliability, become crucial.

HIGH RISK, HIGH COMPLEXITY

Definitively demonstrate your experiential authority.

LOW RISK

HIGH RISK

LOW RISK, LOW COMPLEXITY

Demonstrate Authentic and Reliability.

The situations where people are most comfortable making autonomous decisions. Here the role is simply to aid those decisions.

In these situations, people are happy to make autonomous decisions despite higher risk of getting it wrong. Being reliable is the key factor to influence, with information that enables people to make their own decisions the secondary key factor.

HIGH RISK, LOW COMPLEXITY

Dial up Information & Affinity to guide decision making.

LOW COMPLEXITY

27

Seek to create personal, proximate affinity.

The situations where people are comfortable making autonomous decisions. Building affinity through character is the key to successfully influencing consumer decisions.

WHAT TO DO

Seek to create emotional proximity. Showing that you've understood people's circumstances is not enough on it's own. Dial up similarities of interests, seek to be likable, and be generous to create greater influence.

WHAT NOT TO DO

Seek to create distance from people. Here authority is not your friend, with even your own experience being less useful at creating influence.

28

Definitively demonstrate your experience.

In these situations, people are seeking clear guidance and ready solutions. Here, above all other scenarios, experience, authenticity and reliability, become crucial.

WHAT TO DO

Be accessible and available, Show that you've understood the situation, and then take action. Leverage your experience directly and through your own reviews, and demonstrate that you can be relied on. Little else actually matters.

WHAT NOT TO DO

Waste time seeking to establish rapport, likeability, your title or position of authority. Information carries relatively little importance and is certainly not substitute for action & solutions.

Demonstrate Authentic and Reliability above all

The situations where people are most comfortable making autonomous decisions. Here to role is simply to aid those decisions.

WHAT TO DO

Using your experience to be authentic and reliable. Show you understand their circumstances and aspirations. Above all, keep it simple.

WHAT NOT TO DO

Seek to overplay your role. A light touch is most successful here. Information is unhelpful in situations that are not seen to be complex in the first place. Likewise, your authority has a more limited role here.

# Dial up Information & Affinity to guide decision making

In these situations, people are happy to make autonomous decisions despite higher risk of getting it wrong. Being reliable is the key factor to influence, with information that enables people to make their own decisions the secondary influence lever.

WHAT TO DO

Build affinity above all else, Whilst there is little substitute for being reliable, showing that you understand the individual, being likable and having relevant information to help them navigate the decision will make you more influential.

WHAT NOT TO DO

Focus on your own authority. Titles, recommendations and reviews are less important in to impact decisions. Be laser-focused with information. People know the outcome they're seeking, information is only useful in navigating to that outcome.

31
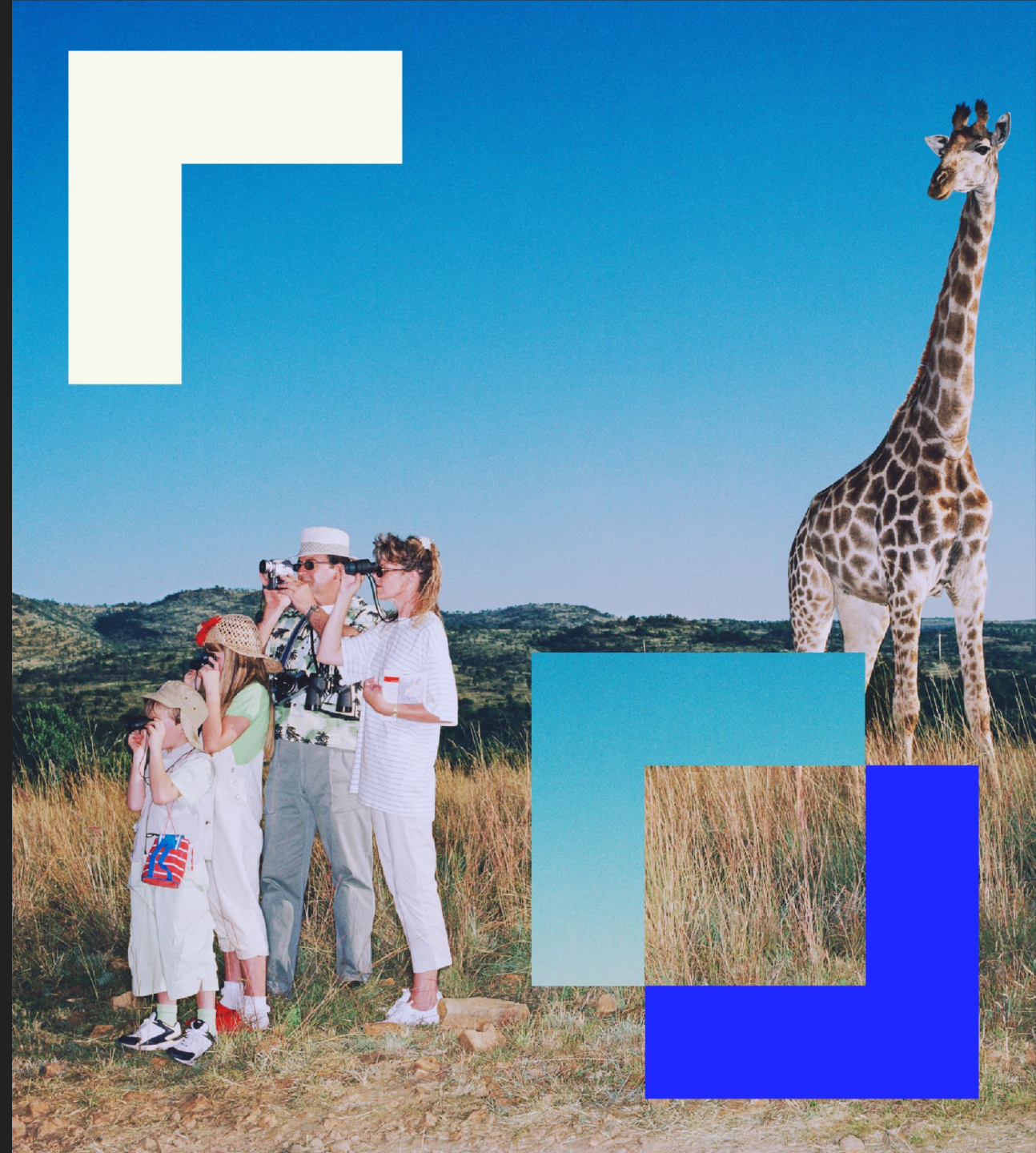
The *influence postures* that work best in travel.

As we have seen in our study of overall influence, different postures or behavioural archetypes can work well to build greater levels of affinity for brands.

Given the different reasons why people are travelling and the outcomes they may seek...certain postures can prove more powerful in building the potential for influence.

Disruptive Influence appeals to the Adventurous Spirit

DISRUPTIVE INFLUENCE

Bear Grylls

Warriors who help people fight by giving them more conviction.

EXAMPLES

Bear Grylls, Laura Dekker, Greta Thunberg, Patagonia, Dove, UnderArmour

Who is it for

13%

Disruptive Warriors are bold and assertive, appealing predominantly to younger males and high-income groups.

APPEALS MORE TO

- Males (17%, 130ix)
- Younger audiences *Gen Z (20%, 153ix) Millennials 23%, 176ix)*
- Higher income groups >$130k (21%, 161ix)

* Of the population see the Disruptive Influence as the most likely to inspire them to take action toward their travel goals

When is it for

Seeking novelty & adventure

Those who thrive on novelty and adventure, making them ideal targets for adventure holidays, backpacking trips, and eco-travel.

TYPES OF TRIPS

- Adventure/Active Holidays: **16%**
- Backpacking Trips: **25%**
- Volunteering Trips: **23%**
- Working/Business Trips: **29%**
- Eco-travel Holidays: **20%**

Where is it for

Challenge the unknown

Most applicable to further flung, less familiar destationations where the unknown and challenge beckon.

PREFERRED DESTINATIONS

- MENA + Africa: **28% (176ix)**
- Central & South America: **21% (157ix)**
- Antarctica: **11% (146ix)**

LESS LIKELY DESTINATIONS

- Within Australia: **54% (81ix)**
- New Zealand + Pacific region: **41% (91ix)**

Provocative Influence opens up New Experiences

VISIONARY INFLUENCE

Alex Honnold

Trailblazers empowering people to defy convention.

EXAMPLES

Malala Yousafzai, Rihanna, Airbnb, Netflix

Who is it for

37%

Provocative Innovators are creative and forward-thinking, appealing across all demographics, slightly more to males and middle-aged groups.

APPEALS MORE TO

- Males **(40%, 107ix)**
- *Millennials* **(42%, 112ix)**

* Of the population see the Provocative Influence as the most likely to inspire them to take action toward their travel goals

When is it for

Seeking transformation & growth

Those who thrive on adventures grounded by purposeful work, always seeking the next challenge.

TYPES OF TRIPS

- Full Package Tours: **45%**
- Organised Group Travel: **50%**
- A Holiday with a Little Work: **47%**
- Eco-travel Holidays: **47%**
- Sustainable and Ethically Sound Activities: **52%**

Where is it for

Uncharted territories

Most applicable uncharted territories, where true adventure awaits. Deterred by home comforts.

PREFERRED DESTINATIONS

- MENA + Africa: **(20%, 126ix)**
- Antarctica: **(9%, 118ix)**
- Central & South America: **(15%, 115ix)**

LESS LIKELY DESTINATIONS

- Within Australia: **(64%, 95ix)**

Curated Influence brings structure to the unknown

03

CURATED INFLUENCE

Stanley Tucci

Forward-thinkers who help people to enrich their experience.

EXAMPLES
Jamie Oliver, Tim Cook, National Geographic, Masterclass

Who is it for

21%

Of the population feel strong affinity with curated Influence appealing mostly to younger audiences with middle-range incomes.

APPEALS MORE TO
- Younger audiences *Gen Z* (28%, 129*ix*)
- Higher income >$130k (25%, 118*ix*)

How to do it

Seek depth and authenticity

When people are resourceful and knowledgeable of their destination.

TYPES OF TRIPS
- Backpacking Trips: **32%**
- Volunteering Trips: **31%**
- Skiing Trips: **30%**
- Adventure/Active Holidays: **28%**
- A Holiday with a Little Work: **28%**

When to use it

Structured travel experiences

Most applicable for well-thought-out structured travel experiences. They enjoy the comfort of an organised trip.

PREFERRED DESTINATIONS
- MENA + Africa: **21% (134*ix*)**
- Central & South America: **18% (131*ix*)**
- Antarctica: **9% (111*ix*)**

LESS LIKELY DESTINATIONS
- Within Australia: **59% (88*ix*)**

Transformative Influence helps Facilitates Progress

TRANSFORMATIVE INFLUENCE

Angelina Jolie

Massimo Landucci/KIKA Press/Co

Coaches who help people achieve their personal progress.

EXAMPLES
Angelina Jolie, Scott Pape, Mark Manson, Peleton, Apple, Oatly

Who is it for

26%

of people feel strong affinity to Transformative Influence. Use it to connect to people seeking to gain greater confidence and control of aspects of life, across genders & generations.

APPEALS MORE TO
- Females *(28%, 107ix)*
- Younger audiences *Gen Z (39%, 148ix)*
- Mid-range and high incomes incomes *($65k-$130k, 108ix)*

How to do it

Seek to Give People Greater Control

When people are resourceful and knowledgeable of their destination.

TYPES OF TRIPS
- Working/business trip: **40%**
- Eco-travel holiday with sustainability options: **39%**
- Wellness/retreat: **38%**
- Backpacking trip: **38%**
- A Holiday with a Little Work: **38%**

When to use it

Influential In Changing Behaviour

More influential in changing behaviours than maintaining existing. Amplify Character and Experiential Authority to create Proximity, highlight changes with Comparative Information.

PREFERRED DESTINATIONS
- Central and South America **17% (123ix)**
- Antarctica: **9% (115ix)**
- MENA + Africa: **18% (115ix)**

LESS LIKELY DESTINATIONS
- None

Motivational Influence amplifies Personal Meaning

05

MOTIVATIONAL INFLUENCE

Matty J

Peers who help people contribute by shared understanding.

EXAMPLES
Abbie Chatfield, Jackie O, Maccas, Care/Of

Who is it for

11%

They appeal equally to both genders, slightly more to younger audiences and those with higher incomes.

APPEALS MORE TO
- Younger audiences *Gen Z (13%, 114ix)*, *Millennials (14%, 127ix)*
- Higher income groups *>130k(12%, 111ix)*

How to do it

Seek to Give People Greater Control

Create memorable experiences that people will be eager to share and draw on for years to come.

TYPES OF TRIPS
- Eco-travel Holidays: **20%**
- Milestone Holidays: **13%**
- Sustainable and Ethically Sound Activities: **22%**
- Adventure/Active Holidays: **19%**
- Wellness/Retreats: **16%**

Where is it for

Maintain Existing Behaviours

More influential in maintaining existing behaviours than changing. Use Relatability, Proximity and Character to create affinity, supported by Experiential Authority to subtly guide decision making.

PREFERRED DESTINATIONS
- Asia: **57% (122ix)**
- Antarctica: **9% (121ix)**
- Central & South America: **19% (139ix)**

LESS LIKELY DESTINATIONS
- None

Progressive Peer helps by creating community

ASSOCIATIVE INFLUENCE

The Blonde Abroad

A friend who feels relatable and approachable.

EXAMPLES
Drew Barrymore, Joe Rogan, Wework, ClassPass

Who is it for

43%

They appeal strongly to older females and lower-income groups.

APPEALS MORE TO
- Females **(48%, 110ix))**
- Older audiences **(Boomers+ 57%, 131ix)**
- Lower income groups **(0-$65k, 52%, 119ix)**

How to do it

Seek Support and Inspiration

Progressive Peers are relatable and approachable, thriving on community and shared experiences.

TYPES OF TRIPS
- Self-organised Holidays: **53%**
- Short Quick & Easy Breaks: **53%**
- Family/Budget Holidays: **50%**
- Caravan/Campervan Trips: **51%**
- Sight-seeing Trips: **49%**

Where is it for

Celebrating Familiarity

More influential in celebrating what is already familiar to people, reinvigorating the known, and desired behaviours.

PREFERRED DESTINATIONS
- Within Australia: **75% (112ix)**
- New Zealand + Pacific region: **48% (107ix)**

LESS LIKELY DESTINATIONS
- MENA + Africa: **13% (81ix)**
- Central & South America: **12% (90ix)**

The *opportunities* marketers can *exploit*

With our newfound understanding of modern influence in travel, there are specific opportunities that emerge for brands and marketers to exploit.

01

Destinations aren't as important as desired outcomes.

Given the relative importance of Affinity and waning importance of information, illustration of destination is less necessary. However, there is great potential to build affinity and resonance by connecting with the outcomes the audience may want to experience at a destination. So, don't show a beach that competitors also can...illustrate the personal benefit of time spent at your particular beach.

02

Experience is critical for the audience, especially when the stakes are high.

When relatability and proximity are less important, the narrow zone of permitted influence becomes broader. This allows for domain expertise and those who are able to deliver reliable outcomes to be more potent as sources of influence. Knowing where and when your audience is under pressure to decide, can provide your brand with opportunities to deliver highly useful expertise.

03

Effective signalling helps audiences navigate towards the influences they seek.

Although culture codes and signalling are less prevalent, they still provide useful mental shortcuts for travellers who are looking for influence sources they can rely upon. Showcasing expertise and reliability in a manner that can be quickly and easily understood will help audiences navigate towards you and build your credibility as an Authority.

04

Character judgements are made more quickly in a crisis.

Affinity is traditionally built slowly, with trust earned gradually. With weather, setbacks and other factors all contributing to the change in what travellers may experience quickly, who we choose as a source of influence happens quickly. Especially in a crisis. Much like the aforementioned signalling, displays of relatability are critical to build trust that is required in high risk decision-making.

The *real power for influence,* lies in experience.

When it comes to travel and holidays, *we now expect every single trip to be a 'once in a lifetime' experience.* These heightened expectations, coupled with our fear of not fulfilling them has radically changed the way influence operates in the category.

Gone are the days of uniform and templated travel, as Australians are now actively seeking uniquely personal journeys, and they are still willing to spend big to get them.

The implication for the industry is that the *traditional, destination-led 'one-voice-to-many'* conventions that have worked in the past, are *not as effective*.

To be truly influential, we need to shift our focus. We must work to relieve the fears of an audience who are *terrified of 'getting it wrong'.* Especially in the post-Covid reality where risk, cost and consequences can all escalate quickly. For this reason, authenticity and reliability have emerged as the critical factor to wield influence in the travel category.

Authenticity and reliability comes by establishing your experience, and your ability to assist audiences to achieve the personal and unique outcomes they seek from travel.

Demonstrations or visual displays of destinations won't cut it for experience-hungry Australians. *They want specific outcomes,* and they want to know your brand is someone who they can count on to help them achieve them.

This shift in attitudes provides huge *opportunities for growth, specifically in a category that is saturated with cliches* in its communications.

However, as always influence is a great power. And with great power comes great responsibility. So wield responsibly.

40