

User Journey

The user journey shows the collective journeys of inbound and outbound TAs as well as travellers. It highlights the processes they each go through before the trip, during the trip and post trip. Through showing the different user journeys concurrently, we are able to compare and contrast the similarities and differences in operations and processes across the inbound TAs, outbound TAs and travellers. The user journey also shows the areas in which they concentrate their time and effort in and highlights the areas where not much attention is given by the different users.

Pre-Trip



Outbound TA:

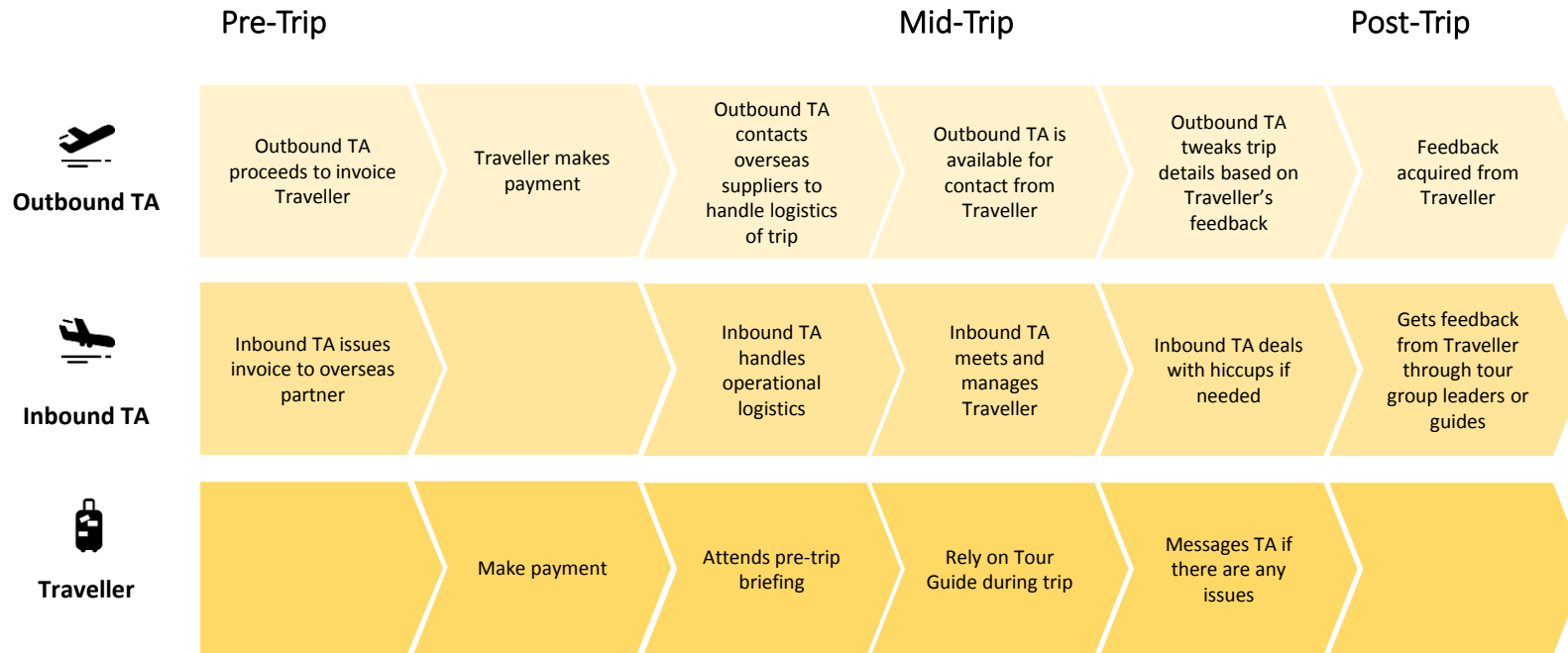
- Outbound TAs mostly receive emails from customers as their website does not provide a holistic online booking experience. This adds on to the manual processes.
- Researching and designing the itinerary with the Traveller will take a few rounds of emails and phone calls especially for customised trips which can take up a longer time.
- Has a database storing trusted overseas supplier's offerings and frequently sources for new experiences.

Inbound TA:

- Inbound TAs will email their standard packages and updated price list to their overseas partners.
- Inbound TAs will usually arrange the bookings as per their standard package.
- But the increasing trend of trips being customised requires inbound TAs to source for other arrangements to meet Traveller's special requests.

Traveller:

- Traveller will still carry out preliminary research of the destination online or obtain recommendations from people they know even if they have decided on engaging a TA.
- This will be used as a basis of comparison when engaging the TA.



Outbound TA:

- Bookings are done through the GDS which are linked to systems that integrates it to accounting functions
- Sends email to trusted overseas vendor for the tour packages and other land arrangements
- TAs seldom get contacted by the traveller abroad if a tour guide or leader is taking care of them well. But if anything unforeseen occurs, the TAs will render help

Inbound TA:

- Does not have contact with traveller during the planning phase
- Invoice is emailed to the overseas partner
- Handles land operations for transport, tours, dining and attraction tickets
- Provides service and support to travellers throughout the trip in Singapore through tour guides
- Believes their good service and packages will spread by word of mouth back home which can help garner more inbound travellers

Traveller:

- Some TAs require payment to be done at the outlet or post the cheque
- Pre-trip briefing is useful but will need to head down to the outlet to attend
- Strong reliance on TA during the trip, for advice and improving their experience



Insights

The 10 key insights are categorised into 3 broad groups: trends, processes and perceptions of travel agents.

01

TAs are under pressure to capture the burgeoning Free & Independent Travellers (FIT) market online

Many TAs now feel that “FITs are more savvy, they know what they want.” On top of knowing what they want for their travel, they want to be able to plan and organise it online. 78% of survey respondents use travel sites like Expedia, Zuji and Airbnb when planning their travel. Most of these sites have a booking engine, affording customers a one-stop-shop for their travel planning. TAs see the growing importance to “make it as easy as possible for the customer to book on screen eventually.”

TAs are looking to “evolve (themselves), targeting FITs because it’s a trend” while still catering to the traditional means of engaging their loyal customers.

TAs have taken note that the FIT market is growing. Unfortunately, TAs “feel that (they) are not picking up as much as (they) would like to in this sector of the market.”

“There’s a growing trend for FIT, but they’re **not coming to us**. Because there’s this **growing trend of OTA.**”

02

An online presence is becoming more important as customers start to find travel inspiration online

Travellers are starting to use social media and travel applications such as Dayre for travel inspirations. TAs in Singapore are facing strong competition from recognised Online Travel Agents (OTAs). They question “how (they can) compete with the global OTAs who advertise almost everyday.” On the traveller’s side, only 19% of survey respondents sought information from travel agencies through their online site, travel fairs and even less at the brick-and-mortar stores.

TAs do recognise that they have to change their business process to effectively reach out to their customers. Marketing staff in the industry needs to be trained in digital and social media marketing.

However, TAs are uncertain on how to go about it. “I rather go through social media to promote but I don’t know how.”

“My instagram is very travel related... so I can check out **the places I want to go to, who has travelled where.**

”

03

TAs need to stay ahead of the research-savvy younger generation

With the internet, more travellers are in the know of the travel destinations they are interested in. 68% of the survey respondents mentioned that they spend the most time doing research and 56% in organising their itinerary. In addition to being research-savvy, these individuals are also cost efficient. Customers will “compare prices (online) to see if (they) can get a better deal...(and) understand the average price for the season.”

TAs note that “with the internet, customers would do research before purchase. As a result, TAs feel that they need strategies in place to stay ahead of new product offerings across different destinations as well as to cater organically to various customer itineraries.

“Difficult to sell to someone **more knowledgeable than you.** ”

04

TAs and Travellers look for more dynamic ways to customise itineraries

There is a growing trend of customising itineraries as people's expectations have changed. TAs posit that "it is a matter of (them) being able to evolve the model to largely address the changing behaviour of the consumer."

TAs note the increasing trend of having customised itineraries and see creating exclusive experiences as a means to differentiate themselves. They note that "nowadays, even if (the TAs were to) have packages, the customers would still customise it."

TAs are finding ways to integrate dynamic packaging into their solutions. "To us, it is very important to make it as easy as possible for the customer to book on the screen eventually."

On the other hand, TAs are also facing high inefficiencies with manually customising itineraries, due to the many iterations to cater for and other "considerations to completely customise... (such as) transportation, driver allowance, guide accommodation, etc."

“A dynamic package able to **assemble and extend** to our customer.”

05

Customers value the contact with TAs during their travel

Being experience specialists, TAs are seen as valuable persons-to-contact in the event of an emergency, trip disruption or simply for feedback during the journey. Customers interviewed mentioned that one of the benefits of the TA is being contactable and able to advise them during their trip. However, TAs are not capitalising on the importance placed by customers of having contact with TAs during their trip.

Customers value the added assurance, having contact with their TA during their trip but TAs have not capitalised on this, optimising their involvement and presence at the pinnacle of the trip planning, when customers are on their trip.

“They even call us during their trip to resolve problems for them. ”

06

Technology to enable TAs to provide quality high-touch service

TAs feel that they “would definitely need to continue to adopt technology as the enabler.” Although TAs mentioned improvement through technology as a strategy for the future, they also mentioned that this is a high-touch industry and a “personal touch is still important for customer experience.”

The human touch, to spend time with the customer, learn about them and to be able to cater to their needs allows them to build connection and loyalty with their customers. Customers interviewed mentioned the quality service of the TAs as a strong pull factor for engaging them.

This is especially so for inbound TAs. Inbound TAs mentioned that they have to maintain a high degree of personal contact with their traveller. “We have to make sure it is really quality services that we are giving. It must be really something that the passenger wants.” Although some TAs feel that technology cannot substitute customer service.

It is therefore imperative that technology solutions should support and enable TAs to provide a higher level of service and experience for the customers.

“Personal touch is still important for customer experience. **Technology is to reduce document works and streamline the service. So our staff could spend more time with customers.**

”

07

TAs are trusted designers of travel experiences bogged down by manual inefficiencies

TAs are able to design and craft a holistic travel experience for their customers. TAs view themselves as experience specialists. “We emphasise a lot on service to the client. Whatever we do, the priority is for their holiday to be the best that we can give.”

Like a travel design concierge, they take into consideration the needs of their customers and are able to leverage their travel expertise to design travel solutions that meet customer’s needs.

Although specialists in this field, a number of TAs stated that they are bogged down by the manual inefficiencies which divide and often times requires most of their attention. For example, “(they) booked directly from the budget airline websites but these records are not linked to Global Distribution Systems (GDS). (They) need to key into the system manually for invoicing.” On sourcing for new experiences and destinations, TAs find that “doing all this research is very time consuming.”

“We spend **more time keying in information** than really running things.”

08

Current technology solutions in the market do not meet the needs of TAs

Many of the TAs who have tried off-the-shelf systems have found it lacking. A TA mentioned, “what they promised wasn’t what they really delivered. We tried but it wasn’t what they really delivered.”

TAs posit that solution providers who are not from the travel industry and do not understand it. “[The developers] don’t know our lingo.” This results in incomprehensive technology solutions. Also there is a steep learning curve for new systems and TAs are hesitant to “change the system because it’s very troublesome to relearn another tool.”

Although technology solution providers have gotten a negative reputation, TAs do recognise the need for them as they do not have the IT manpower or know-how. A TA mentioned that, “If (they) are competent to develop (their) website, it will definitely be beneficial to (them).”

TAs recognise that they need something more customised, to cater to their individual working styles. TAs “are exploring to see how (they) can work with (developers) and tailor-make (solutions) to (their) needs.”

“Behind the scenes it is very intricate. People who **don't really understand travel they only give a very surface solution.**”

09

TAs want a fully integrated system, but this means different things for different TAs

There is no one-size-fits-all for the travel industry. TAs have different ways of working and although some TAs stated integrated systems as an ideal, what they want integrated is different across the different TAs, according to what they feel will improve their efficiency.

Outbound TAs focus more on bookings for flight and hotel and leave the land arrangement to their overseas partner. They look at building a strong overseas supplier base. Inbound TAs look more into operations such as land arrangements, transfers, tours and other activities.

TAs are looking for more innovative ways to optimise efficiency, to “complete this whole process, not just dynamic packaging, the middle the end, to the accounting to the suppliers, vendors.”

“We want to do the contract in the CRM system itself. ”

10

Travellers perceive that TAs do not afford them a sense of control over their own trips

Travellers gain a sense of accomplishment from researching and planning their own trips. 26% of survey respondents feel that itineraries proposed by TA's are rigid. Customers interviewed felt they lack freedom when in a tour group. "Let's say I don't want to do this but I have to go because it's part of the tour package." By engaging a TA, they perceive there are certain things they cannot control which hampers them from engaging a TA.

TAs also note the trend of semi-planned itineraries where "most of the people now would just book air plus hotel

and maybe when (they are) there then (they will) decide what (they are) going to do today."

Customers book staples such as flight and hotel with a TA and plan their itinerary on their own. However, 55% of survey respondents engaged the TA due to the variety of activities offered. TAs need to leverage on these factors and find ways to provide travellers, especially FIT, a greater sense of control in the planning of the trip itinerary as the importance of being in the know and having a smart purchasing behaviour of customers of today cannot be undermined.

“I think it is **very tiring**. So they always need you to wake up very early. And you're always changing hotel every night... **It's not at your own pace.**

”