DECODING THE NEXT

Strategic Foresight at LIH

STRATEGIC INTELLIGENCE

Decoding the NEXT:
Agenda-Setting Insights

Strategic Intelligence acts as a connective layer across the full spectrum of intelligence types—integrating insights from industry, humanity, and technology while spanning the temporal range from NOW and NEW to NEXT.

Unlike traditional Business Intelligence, which often leans heavily on internal data and present-focused metrics, our mission emphasizes external sensing and forward-looking insight.

By triangulating market signals, cultural shifts, emerging technologies, and long-term futures thinking, Strategic Intelligence ensures the organization is not just responsive to change, but actively anticipates and shapes it.

NEXT
5-10 years

HORIZON 3
Entirely new competencies and potential

NEW
2-5 years

HORIZON 2
Explore & discover new markets

NOW
1-3 years

HORIZON 1
Maintain & strengthen core business

Value

Time

FORECAST

SYNTHESIS

ANALYSIS

FORECAST

SYNTHESIS

ANALYSIS

INDICATOR
STACK

Decoding the NEXT:
Agenda-Setting Insights

Our research combines a data-driven approach with unconventional external data sources to uncover unique insights.

By integrating diverse perspectives— from consumer sentiment to funding dynamics—we provide a comprehensive foundation for decision-making.

This external focus enables us to identify trends, measure impact, and connect actionable intelligence to strategic objectives, ensuring decisions are informed by a broad, dynamic understanding of the ecosystem.

LAGGING INDICATORS

LEADING INDICATORS

IMPACT
Making sense of results

OUTCOME
Making sense of resonance

OUTPUT
Making sense of action

INPUT
Making sense of interest

CONSUMER SENTIMENT

Reviews
Social Listening
NPS & Customer Satisfaction

INDUSTRY NARRATIVE

Media Sentiment
Earnings Calls
Trend Reports
Features & Awards

ACTOR DYNAMICS

Founding Dynamics
Product Launches
Startup Partnerships
Personnel Dynamics

FUNDING DYNAMICS

Venture Capital
CVC
R&D Expenditure

kimola   NETBASE QUID   feedly   NETBASE QUID   feedly   Thinknum   PitchBook   dealroom.co

MARKET DYNAMICS

Stock Performance
Market Shares
Sales Data, Growth Rates

USER BEHAVIOUR

Search Behaviour
App DLs & Usage
Website Visits

TECHNOLOGY DYNAMICS

Patents
Wikipedia Edits
Tech Momentum

SCIENTIFIC INTEREST

Research Grants & Projects
Published Papers

statista   Google   data.ai   PATENTSIGHT   WIKIPEDIA   feedly   Google Scholar

TRAVELER TRENDS META ANALYSIS

PASSION & MINDFUL TRAVEL (STILL) DOMINATE INDUSTRY NARRATIVE IN 2025

Meta-Analysis of 36 Traveler Trend Reports & 316 Trends in 16 Clusters

The travel industry continues to elevate conscious consumer experiences as its dominant narrative, with Mindful Travel emerging as this year's most discussed theme across trend reports, slightly overtaking last year's frontrunner, Passion Travel—which maintains strong relevance through evolving expressions of destination-driven entertainment and culinary tourism.
This narrative shift reflects the industry's increasing focus on sustainability and authenticity, with Pattern Breaking and Transformative Travel further reinforcing a collective pivot toward more meaningful experiences that challenge conventional tourism patterns.

While established themes dominate the conversation, the emergence of AI Travel in over a third of industry reports signals growing attention to technological integration, though traditional experience-focused narratives remain central.

Source: Lufthansa Innovation Hub, TNMT.com, Company Websites & Reports

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77 Mentions   **27/36** Reports

PASSION TRAVEL

#SET JETTING
#GIG TRIPPING
#SPORTS FAN TRAVEL
#CULINARY TRAVEL
#LONGTAIL HOBBIES

77 Mentions   **29/36** Reports

MINDFUL TRAVEL

#LOW FOOTPRINT – HIGH IMPACT
#SLOW TRAVEL
#DESTINATION DUPES
#SMALL DESTINATIONS
#AUTHENIC & LOCAL

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47 Mentions   **27/36** Reports

PATTERN BREAKING

#ALTERNATIVE SEASONS
#DESTINATION DUPES
#SMALL DESTINATIONS
#COOLCATIONING

44 Mentions   **25/36** Reports

TRANSFORMATIVE TRAVEL

#WELLBEING & SLEEP
#SLOW TRAVEL
#CELESTIAL GUIDANCE

COLLECTIVE TRIPS

#FAMILY & FRIENDS
#SOLO TRAVEL

OPTIMIZED BUDGETS

#TRIP OPTIMIZATION
#ALL INCLUSIVE

LUXURIOUS DIVIDE

#BUDGET PREMIUM
#EXCLUSIVE ASSETS

VIRAL TRAVEL

OTHER

AI IN TRAVEL

#AI TRIP PLANNING

RAIL RENAISSANCE

BLURRED TRAVEL

SPORT & ACTIVITY

#SPORT & ACTIVITY
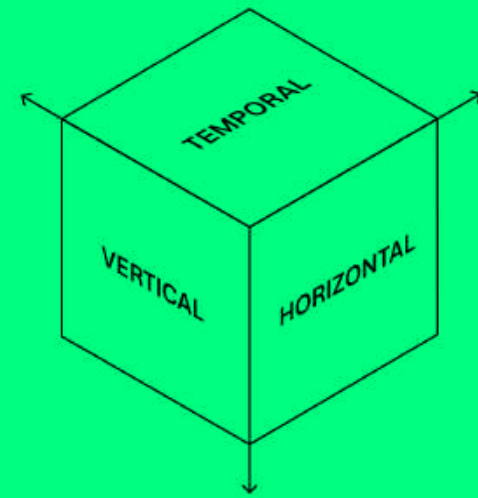
CRUISES

CELEBRATORY TRAVEL

DEI

FORECAST

SYNTHESIS

ANALYSIS

TRIANGULATION MATRIX

Triangulation is the practice of using multiple data sources, methods, or perspectives to validate a pattern—just as ancient navigators used multiple reference points to determine their precise location.

By combining different types of evidence and analytical approaches, triangulation builds confidence in pattern recognition while reducing bias and false positives.

VERTICAL

Pattern Depth & Strength

– Evaluations of patterns in a dataset

– Example: Customer reviews and sentiment indicate pain points and gain points of air travelers

HORIZONTAL

Cross-Domain Patterns

– Maps pattern spread across industries, markets, and domains

– Example: Innovation by passenger cruise lines can help streamline the passenger journey in aviation
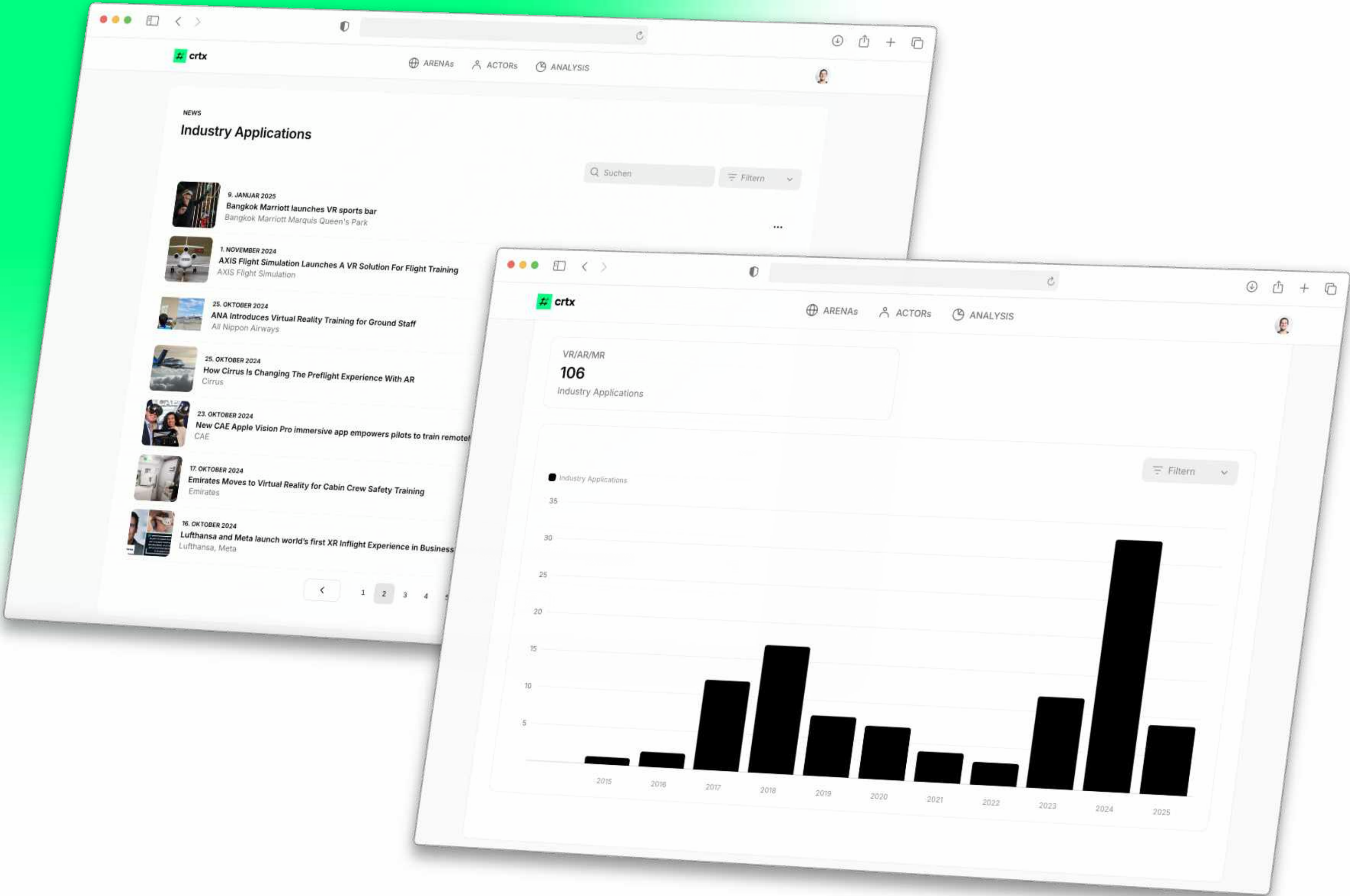
TEMPORAL

Pattern Evolution

– Tracks patterns over time and maps trend dynamic

– Example: Use cases for XR in aviation over time

TEMPORAL
TRIANGULATION

2014

2024

TREND MOMENTUM

AR / VR / MR
106+ PROJECTS IN 10 YEARS

The evolution of VR/AR/MR adoption in the airline industry reveals a decade-long journey of experimentation and gradual implementation. While initial trials began around 2015, the first significant wave of adoption occurred during 2017-2018, as the technology matured and became more commercially viable. Despite a temporary slowdown during the pandemic years (2020-2021), interest rebounded strongly from 2022 onwards.

The industry saw its most dramatic uptick in 2024, catalyzed by Apple Vision Pro's entry, which brought enterprise-grade mixed reality capabilities at a new level of sophistication. This surge reflects how the technology has finally reached a critical point where quality, cost, and practical application converge, making extended reality solutions both technically feasible and economically viable for airlines.

The growth pattern suggests that AR/VR/MR has moved beyond the experimental phase and is now entering mainstream adoption across various airline operations.

Source: Lufthansa Innovation Hub, TNMT.com,

AR/VR/MR
USE CASES

CUSTOMER FACING USE CASES OUTWEIGH INTERNAL

106 Industry applications across 21 Use Cases (some excluded)

AR/VR adoption in airlines shows a strategic dual focus: internally for operational excellence and externally for customer experience enhancement. While internal applications center on critical areas like pilot training and maintenance procedures, external use cases focus on revolutionizing passenger entertainment and service interactions.

Source: Lufthansa Innovation Hub, TNMT.com,

11
Applications

VR IMMERSIVE PILOT TRAINING

10
Applications

VR CREW PROCEDURE TRAINING

10
Applications

IMMERSIVE & AUGMENTED OPEARTIONS

AR WAYFINDING & NAVIGATION

7
Applications

VR IMMERSIVE PRODUCT PREVIEW

11
Applications

AR BAGGAGE SIZE VERIFICATION

5
Applications

VR DESTINATION PREVIEW

18
Applications

IMMERSIVE ENTERTAINMENT

IMMERSIVE MARKETING

6
Applications

IMMERSIVE EXPERIENCES

VIRTUAL TRAVEL & FLIGHT

7
Applications

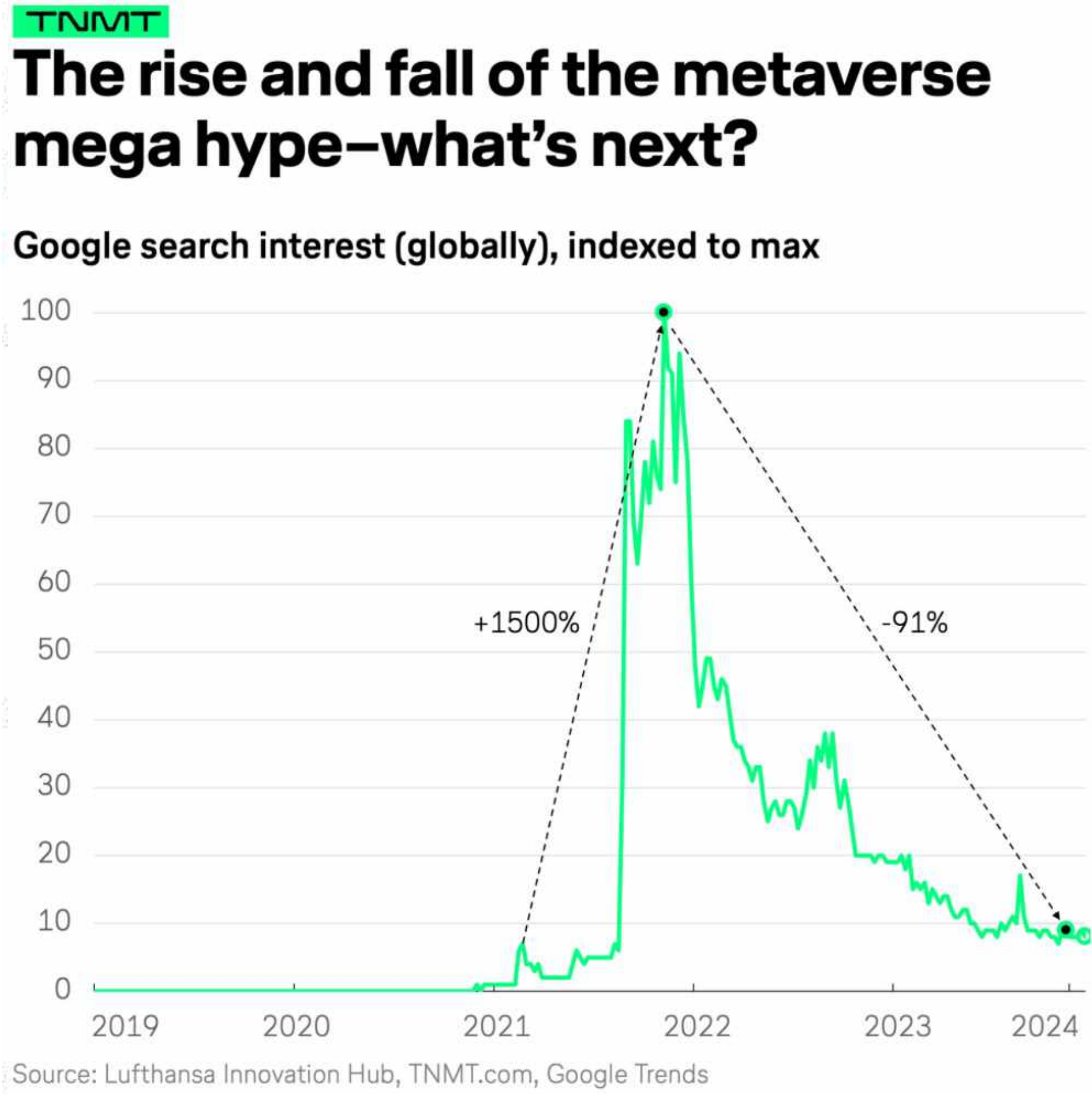VR IMMERSIVE INFOTAINMENT

FORECAST

SYNTHESIS

ANALYSIS

SCENARIOS FOR METAVERSE IN AVIATION

In early 2024, the Lufthansa Innovation Hub, Airbus, and Bauhaus Luftfahrt released a forward-looking analysis that mapped out four scenarios for how the metaverse could shape aviation by 2035 .

The discussion began by recognizing that, although public enthusiasm around "the metaverse" has cooled since its 2021–22 hype peak, core technologies—like immersive reality (AR/VR/MR), blockchain, and Web3—are steadily evolving. Notably, devices such as Apple's Vision Pro point toward a future where spatial computing becomes part of everyday life and travel experiences .

TNMT

The rise and fall of the metaverse mega hype–what's next?

Google search interest (globally), indexed to max

+1500%   -91%

Source: Lufthansa Innovation Hub, TNMT.com, Google Trends

TNMT

Travelers are testing the Apple Vision Pro's applicability for travel

Threads post from February 2024

omarshahine   2 w ···

Hello from Emirates Flight 230 SEA->DXB where my Apple Vision Pro is connected to in flight WiFi and I am watching movies and browsing the web using the entire cabin as my screen. This is wild.

6 replies · 285 likes

Source: Lufthansa Innovation Hub, TNMT.com, Threads

SCENARIOS FOR METAVERSE IN AVIATION

The study then employed a classic scenario-planning approach. More than twenty potential drivers—ranging from regulation to consumer behavior—were evaluated. Two variables emerged as most uncertain yet impactful: consumer adoption of metaverse technologies and metaverse consolidation—i.e., whether we end up with a cohesive interoperable virtual world or a patchwork of isolated platforms. These axes produced four distinct scenarios later detailed across a series of articles.
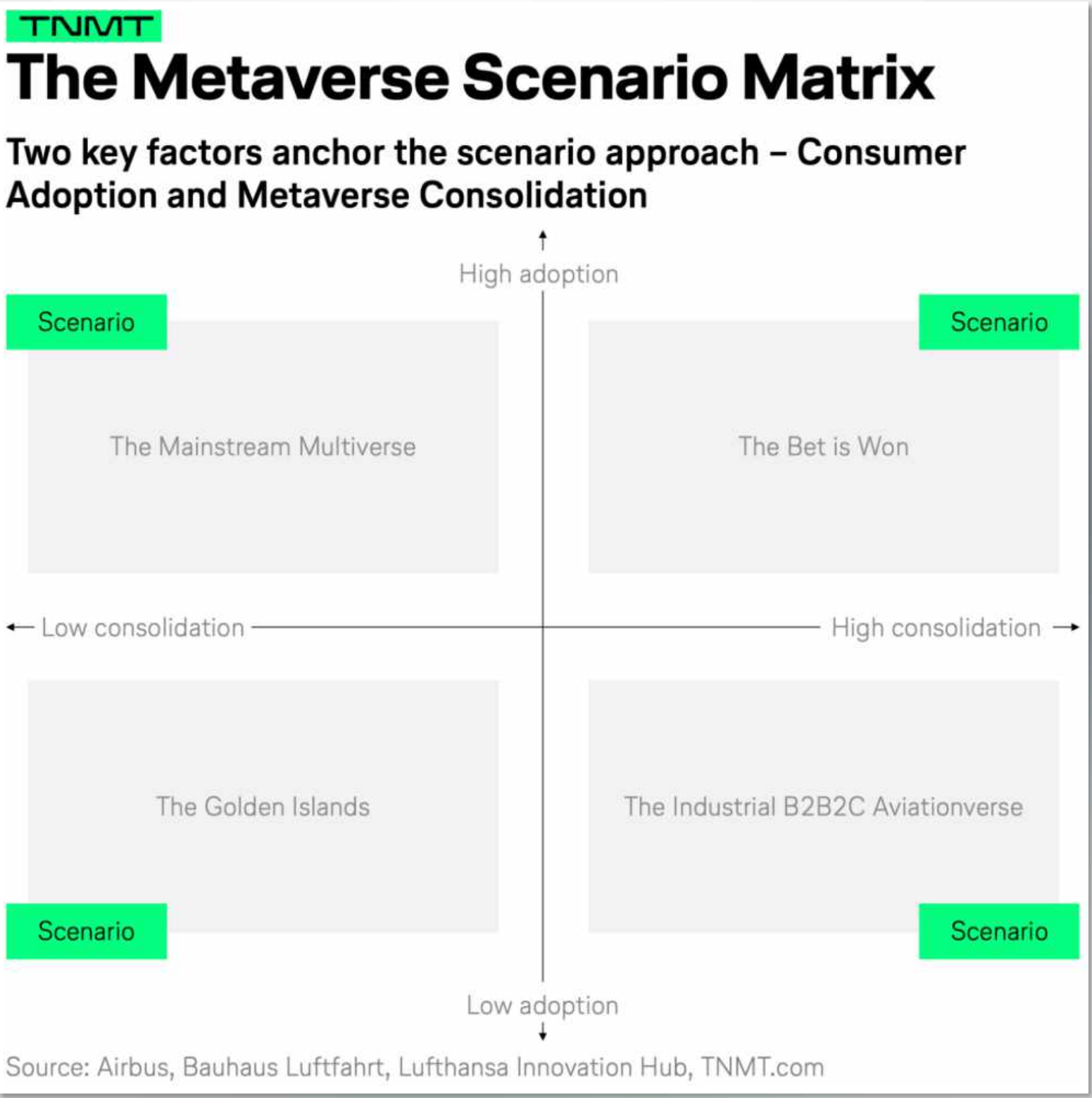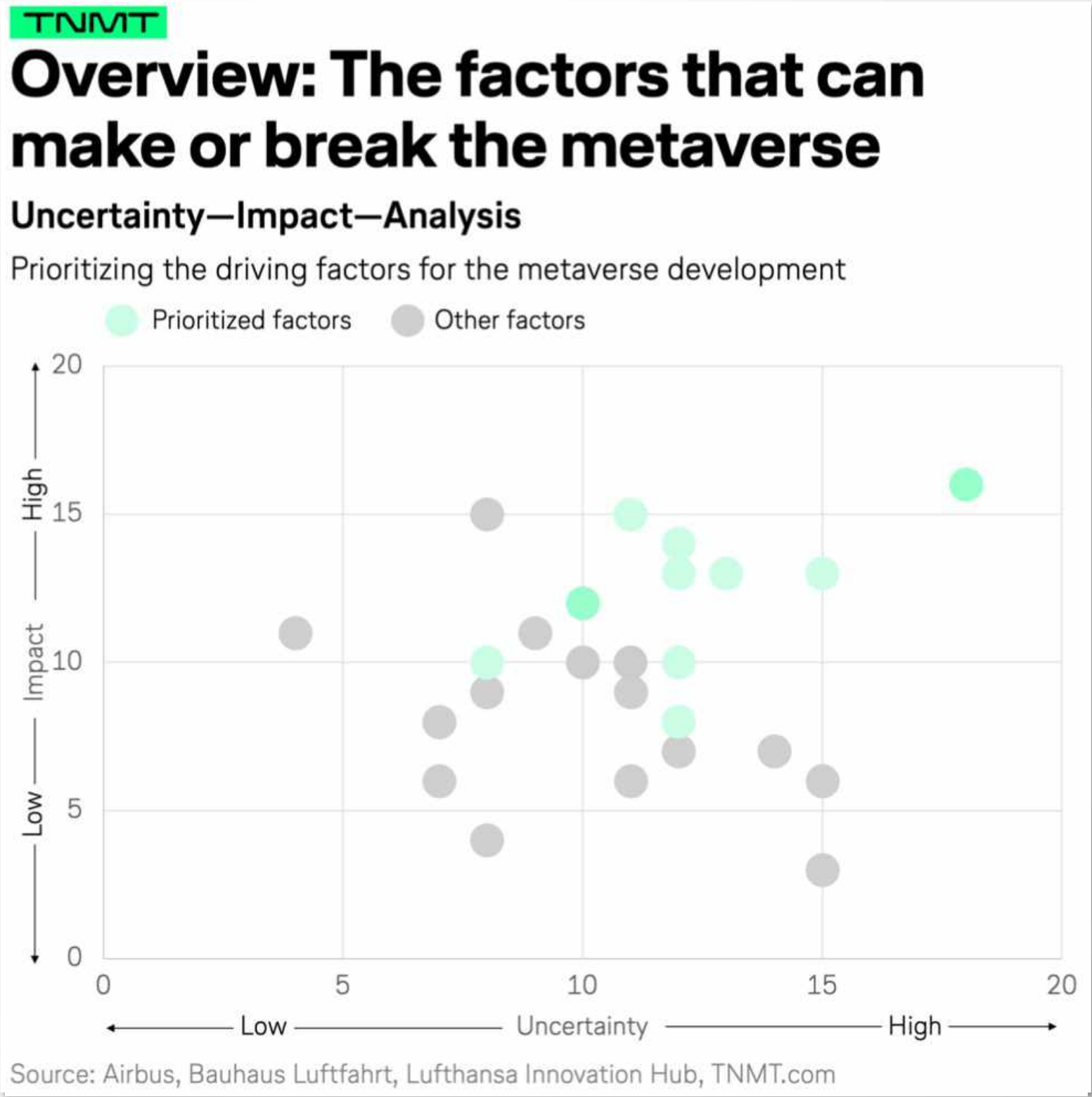
TNMT

Each scenario considers key factors for the inception of the metaverse
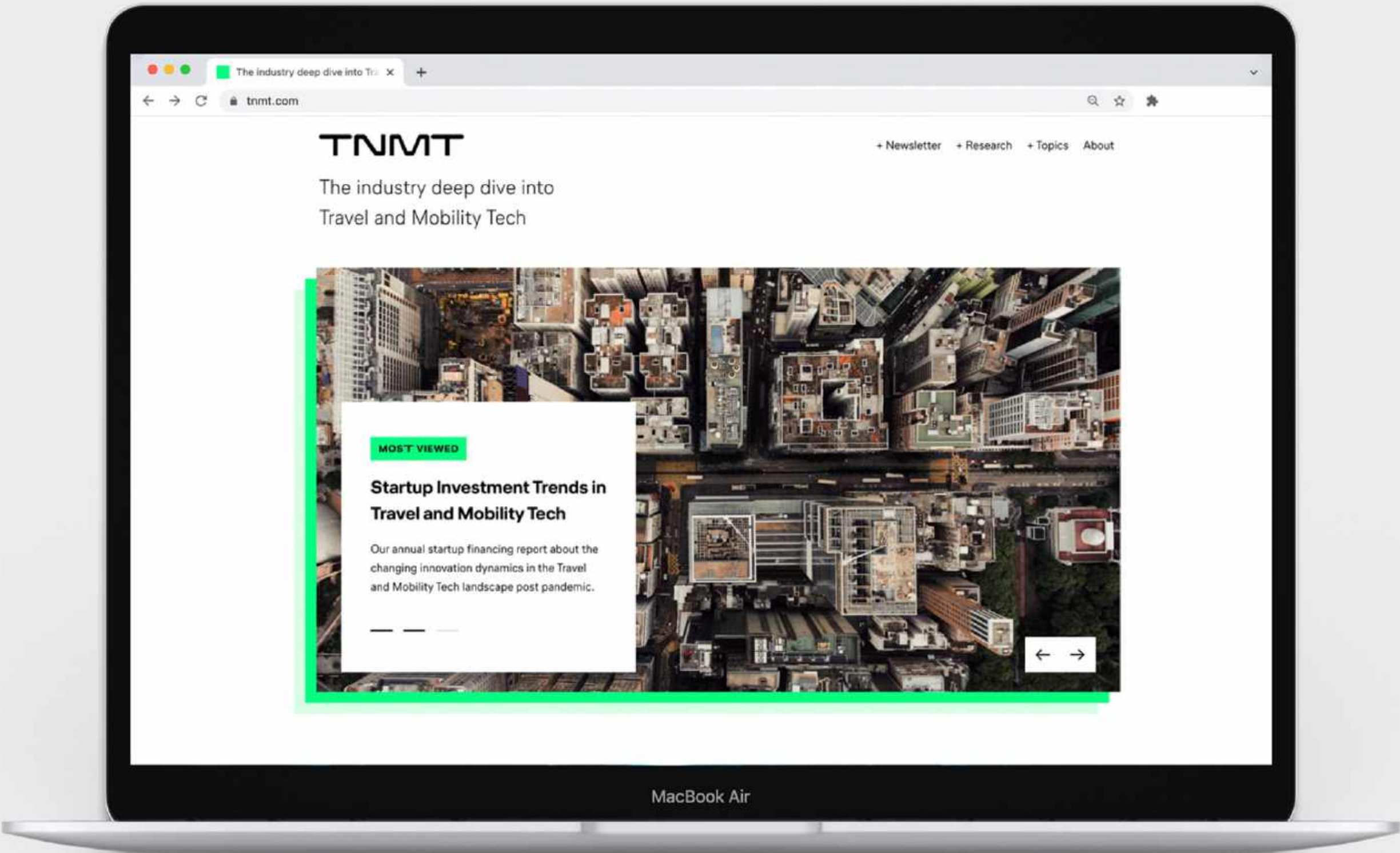
Priority factors for scenario creation and analysis

Factors	Short description
Consumer adoption	The share of consumers that adopt immersive tech hardware and software. This is influenced by purchase costs, ease-of-use and wearing comfort, variety of apps, graphic quality of devices, among others.
Metaverse consolidation	Will a set of fragmented and isolated platforms with limited interoperability dominate the market, or will we see the emergence of one unified metaverse platform that is accessible across regions, consumer groups, and corporates?
Integration of underlying tech	Metaverse is not a technology itself, but a combination of them, supported by immersive tech, AI, blockchain technology, among others. The level of integration between them will be a building or stumbling block in its development.
Cross-industry business relevance	Can metaverse be applied across industries and business types? B2B adoption may be a key development driver in the future.
Substitution potential	Can metaverse substitute physical travel in the future? If so, the potential impact on the travel industry can be tremendous.
Sustainability concerns	Aviation is facing social and regulatory pressure to decarbonize. Immersive applications have the potential to substitute physical travel, can reduce the need for physical resources, and increase efficiency in areas such as agriculture, energy production, and waste management.
User trust	Users will need to trust the security level and available content in the metaverse and be willing to share data to access a more personalized experience.
Availability of funding	The extent to which metaverse technologies and applications will be able to attract financial investment from public or private sources.
Cybersecurity	Cybersecurity measures to minimize the technical vulnerability of immersive hardware and software could be table stakes of metaverse realization.
The role of aviation	Will aviation be an early adopter, a fast or slow follower in metaverse adoption? Depending on which, the industry could accelerate use case creation across the aviation value chain.
Productivity benefits	Metaverse may be able to support daily tasks and activities on a personal and professional level and thereby increase the productivity of its users. If not, its adoption outlook is likely limited.
Strategic differentiation	Airlines can use metaverse as a factor for differentiation in eyes of the consumer/passenger. Metaverse could be an enabler to drive airlines' strategic advantage outside of cost while targeting the mass market.

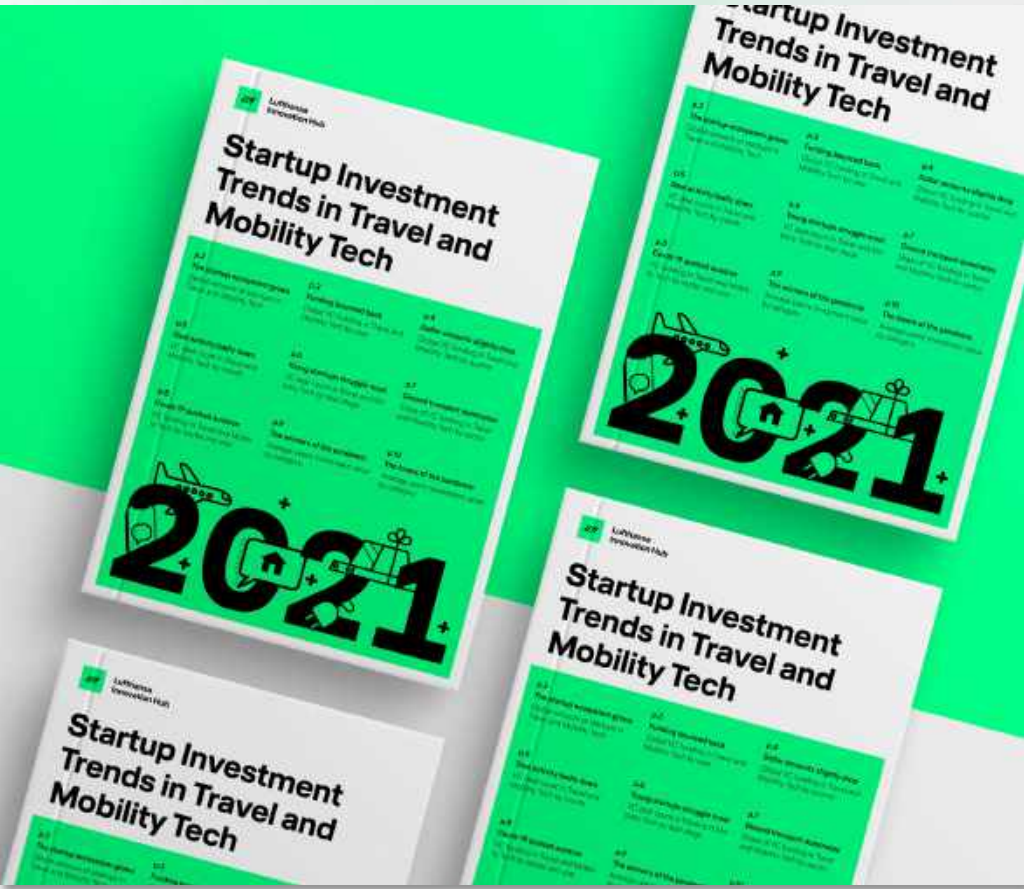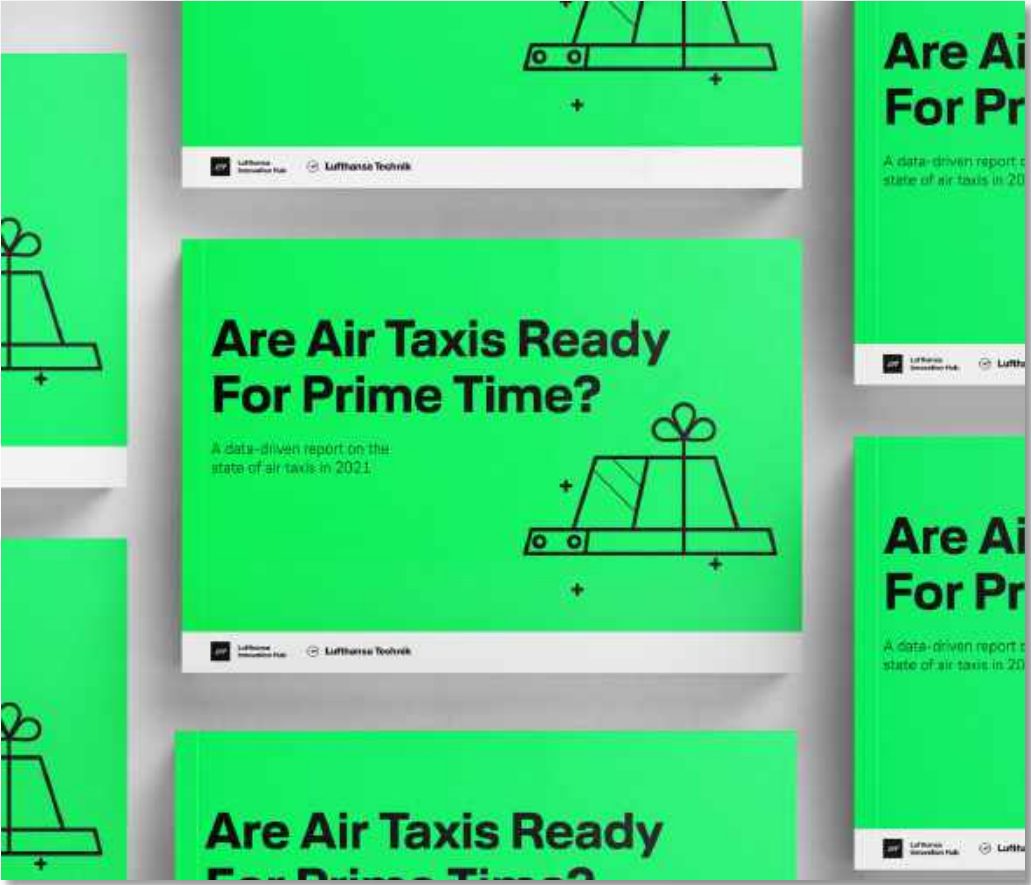Source: Airbus, Bauhaus Luftfahrt, Lufthansa Innovation Hub, TNMT.com

TNMT

Overview: The factors that can make or break the metaverse

Uncertainty—Impact—Analysis

Prioritizing the driving factors for the metaverse development

Source: Airbus, Bauhaus Luftfahrt, Lufthansa Innovation Hub, TNMT.com

TNMT

The Metaverse Scenario Matrix

Two key factors anchor the scenario approach – Consumer Adoption and Metaverse Consolidation

Source: Airbus, Bauhaus Luftfahrt, Lufthansa Innovation Hub, TNMT.com

HERE'S WHAT YOU CAN DO

NEWSLETTER

REPORTS

In the past 10 years LIH has published +15 reports. Additionally we share Deep Dives and Briefings internally within Lufthansa Group.

PORTAL