

The Transformation Era

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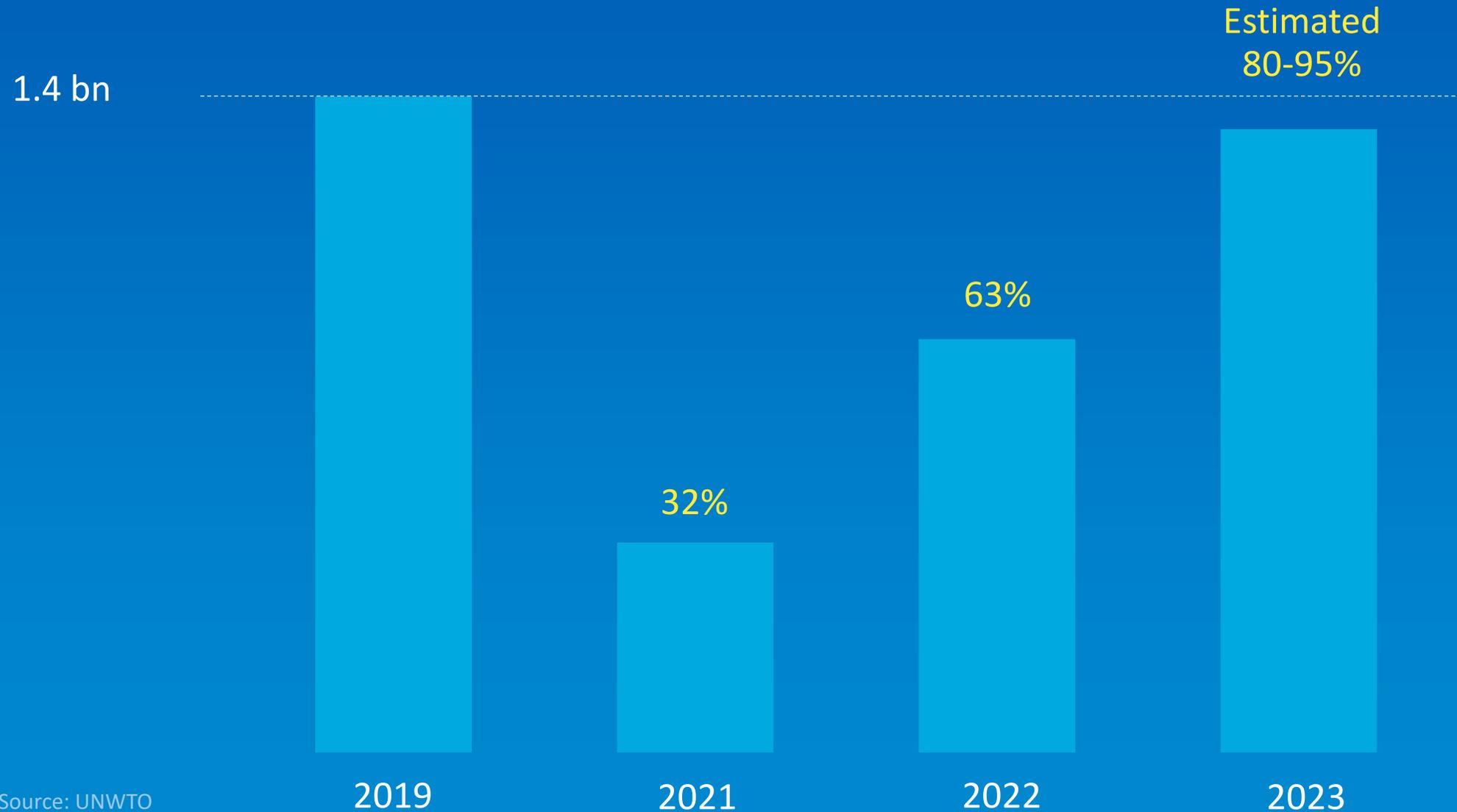


One of the things we've seen is despite a lot of consumers pulling back on spending, **the one area** that I haven't seen them pull back on as much is travel.

Brian Chesky, CEO Airbnb

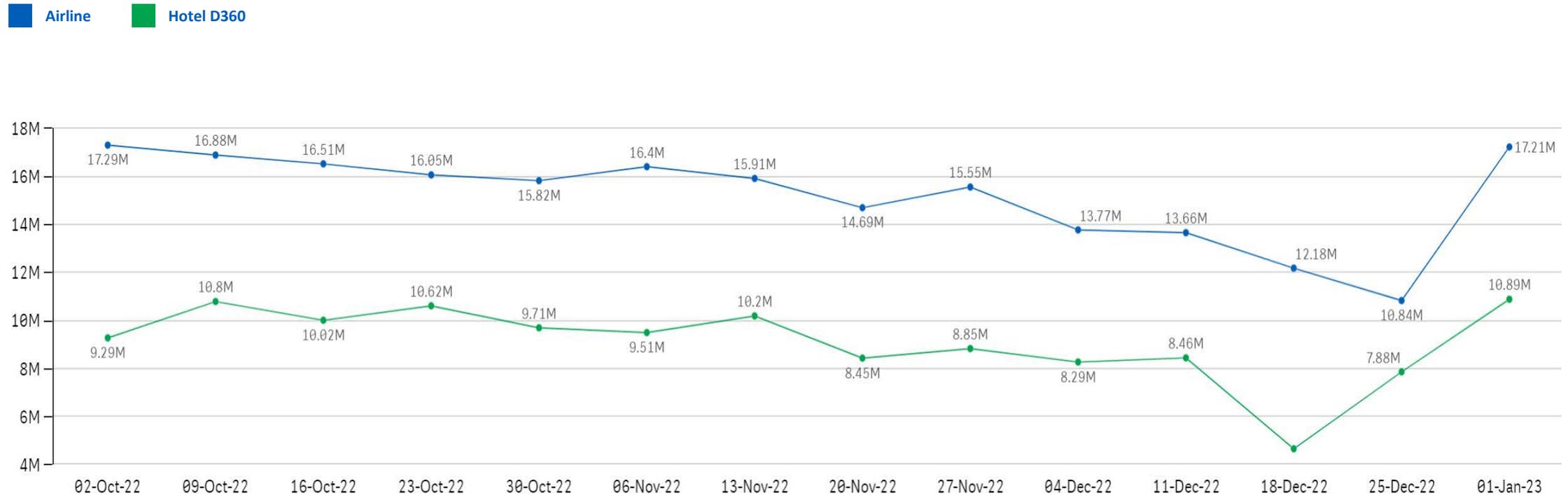


International tourist arrivals expected to rise



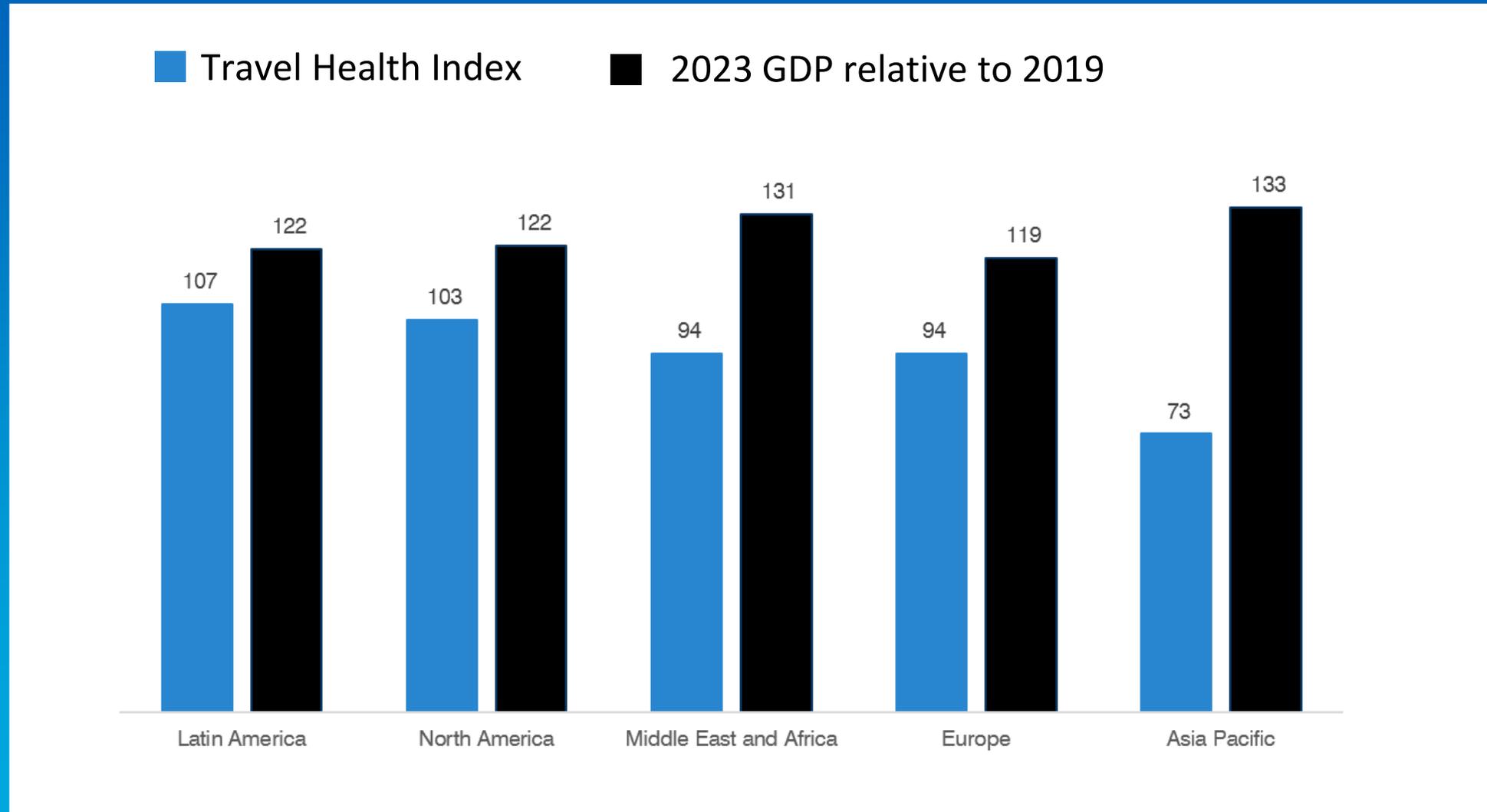
Airline GDS & Hotel Demand360

Booking activity trend boasts an uptick beginning in January 2023



Source: Amadeus' Demand360® data/Airline MIDT
As of: 6th January 2023

There's room for more...



Our world is changing

01



Geopolitics & Economics

- “Blockism” (Polarization)
- Economic slowdown
- Social activism

02



Behavior Change

- Workplace redefined
- Shift to online
- Need for connection

03



Digital World

- An AI revolution
- Merging of virtual and physical
- Surveillance capitalism

04



Sustainability

- ESG
- Conscious consumer
- The say and do gap



Mind a
new type
of traveler

Travelers learn to live with **permanxiety**

- Make the most out of a trip
- Sustainable travel
- Call for less complexity

Traveler
trends



Take
sustainable
travel seriously



The Sustainability imperative.. and the “say-do-gap”

83%

global travelers
think sustainable
travel is vital

Source: WTTC

35%

say the chance to travel more
sustainable excites them

67%

aren't willing to make a
notable sacrifice

Source: Amadeus

Sustainability moves from Marketing to Operations

Forbes

California Bans Single-Use Plastics In Hotel Rooms

Grant Martin Contributor
Travel
I monitor the heartbeat of adventure, budget and consumer travel.



NEW ORLEANS, LA - AUGUST 28: Small plastic bottles of shampoo, conditioner and body lotion sit in a ...

The state of California is officially banning single-use plastic bottles used in hotel and shared home bathrooms. Starting on January 1 of 2023, it will be illegal to use the small plastic bottles for shampoo, conditioner, lotion or any other-single use application in a hotel that's larger than 50 rooms. By January 1 of 2024, it will be illegal to use them in smaller establishments.

Schiphol to offer fewer flights from 2023 as ministers get tough on noise, pollution



It's official: France bans short haul domestic flights in favour of train travel



Paris to London journeys could soon be a thing for jetsetters. Copyright Getty/frankpeters

Technology is changing



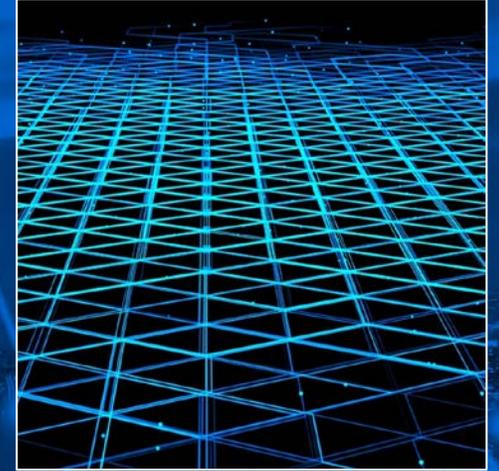
Cloud



Artificial Intelligence



Financial Technology



Cybersecurity & Privacy



Datafication



Digital Identity

What does this mean for travel?

- 01 Traveler trust and confidence is a key currency
- 02 Travelers expect touchless experiences and smoother journeys
- 03 As price of travel increases, reinforcing value matters more than ever
- 04 Agility to adapt is the vital ingredient to growth and expansion
- 05 Technology can unlock transformation of both the traveler experience and travel brands
- 06 Access to talent, expertise and skills increasingly a powerful differentiator
- 07 Give travelers the confidence, information and ability to make sustainable choices

Today's strategic opportunities

- 1. How can you become highly flexible and adaptable?**
Technology partners allow companies to react to changes in the market
- 2. Are you addressing the full customer journey?**
Have access to one open platform to share value across the E2E traveler cycle
- 3. Do you have access to right talent and skills?**
Retain, attract, upskill talent and having access to skills, whether in-house or via partners
- 4. Where do you need to accelerate digital transformation?**
Have a comprehensive suite of solutions to digitally enable business and operations
- 5. Is sustainability included from initial design?**
Find methods to reduce social and environmental impact

What does it mean for the travel players?

Corporations

- Fully digital end-to-end experience
- Traveler ecosystem for the employee well-being

Airports

- Improving the passenger experience - rebuilding post-pandemic to become more agile, data-driven and creative
- Diversify revenue streams - find ways to increase the non-aviation revenues

Hospitality

- Fluctuating demand due to uncertainty, require flexible solutions
- Increase distribution
- Work with trusted partners



Travel Sellers

- Access relevant content to build the journeys travelers demand
- Operationalize data effectively to drive business decisions and revenues
- Digitalize operations to increase efficiency and productivity
- Innovate to deliver real traveler centric experiences

Full-service airlines

- Operational flexibility: ability to ramp up and ramp down rapidly to adjust to market conditions
- Digital Retailing capabilities & new technologies for operations

Low-Cost airlines

- Expand market reach –through alternative distribution opportunities
- Digital Retailing capabilities

Payments

- Frictionless payment experience to travelers
- Use optimal pay-out option

Let technology support
you.

Thank You!

