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Cover illustration by Angela Chan

Note
from the
CEO

WHAT
HAPPENED
TO THE
FUTURE
OF
TRAVEL ?

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omewhere in the spring of 2015, past the early couple of years of startup survival mode at Skift, I was itching to write a manifesto that would put Skift's big-picture view on the global map. Even though I was not the editorial talent at the company — I run the business side — my journalistic instincts knew that putting a 2020 marker on our editorial vision would become our brand voice: That we at Skift are deciphering and defining the future of travel.

Thus came the Skift Manifesto on the Future of Travel in 2020, a 25-page slide deck that burst through the daily blocking and tackling of headlines in the travel sector. It was a monumental hit for us.

As I laid it out in the manifesto, travel is the lens through which to examine our modern world, embedded in every sector and imperfection of the world, the perfect crucible from which all geopolitical trends converge. If travel is the most progressive manifestation of human curiosity, surely it's one of the world's most exciting sectors to be in. The trajectory of travel and the wider world over the last five years has indeed shown this to be the case.

The year 2020 is here. The future of travel is now the present of travel — and it feels like the morning after came with a giant hangover. Travel is now eating the world, in more ways than one. We are by many accounts the world's largest industry and have a footprint to match it. With scale, however, comes complex challenges and a looming backlash from both governments and consumers.

How soon will the travel industry become Big Travel, the way technology services have become Big Tech with significant scrutiny from both regulators and customers? It's happening now in bits and pieces; travel may be in two years where the tech backlash is now. Overtourism, likewise, has become a buzzword and a reality that everyone has an opinion on but few know how to deal with.

This also feels like an age of overload in everything, everywhere. In a world of binge-watching and invasive digital advertising operations, where does travel stand as an antidote to all that is artificial and designed to overwhelm? Can real human connection fostered in a world of surging cross-border travel actually create a stronger, more inclusive world?

The world has changed as Skift has grown into travel's premier intelligence brand helping companies decipher and define trends. So too has the balance of power shifted among travel's biggest players. These are the Megatrends that will determine the fate of the travel sector in a complex and ever-changing global marketplace.

Regards,
Rafat Ali
Founder and CEO
Skift



THE FUTURE OF HOTEL LOYALTY: **RECOGNIZING MORE THAN THE STAY**

Skift Take

Hotel loyalty is no longer just about earning points for hotel stays. Today, forward-thinking brands like Hyatt are extending loyalty “beyond the stay” through a savvy mix of strategic alliances, unique experiences, and new opportunities to earn from daily spending.

Hospitality loyalty programs are in the midst of a dramatic shake-up. Traveler priorities are evolving as consumers seek out more varied options to earn and use rewards beyond the stay. Hotels, too, are adapting their loyalty offerings in response, offering new types of rewards and looking for ways to serve customers not just while they’re on property but as part of their daily lives. How will hotels continue to evolve loyalty beyond the stay? We recently spoke with Hyatt’s Amy Weinberg, senior vice president for the company’s loyalty program, World of Hyatt, to learn more.

SkiftX: World of Hyatt launched almost three years ago. How has it evolved since?

Amy Weinberg: World of Hyatt was founded on a listening-based approach and continually evolves as we seek to understand what’s most important to our guests. We know that when we get to know our members better, we are better able to deliver more personalized care and tailored content based on their needs and preferences.

Since launch, World of Hyatt has led the way with meaningful benefits and experiences

that add more value to members’ lives. These differentiated offerings were built on competitive advantages like confirmable suite upgrades at time of booking and Free Night awards. We also leaned into Hyatt’s purpose — we care for people so they can be their best — to create newer benefits like Guest of Honor, allowing Globalist members to extend their in-hotel benefits to a loved one on an award stay. We continue to evolve based on direct member feedback, which is why we introduced Milestone Rewards, which recognizes members more frequently as they work toward the next elite tier. A very recent milestone was the introduction of four new brands: Thompson Hotels, Alila, Joie de Vivre, and Destination. This enabled us to reach new travelers, grow our footprint in 20 new markets, and provide existing members with more options to choose Hyatt.

SkiftX: There seems to be a growing focus within World of Hyatt on developing strategic collaborations that take place outside Hyatt hotels. What’s the thinking behind this shift?

Weinberg: Care extends beyond when our members are in our hotels. Our strategic

alliances are a reflection of the dynamic lives they lead and our commitment to enhance how they live and travel. We see tremendous value in being where our members already are and where they want to be, and are committed to designing experiences and benefits for them.

Through our new American Airlines collaboration, elite members have more ways to earn miles, points, and status when flying American or staying at Hyatt properties, and they are able to enjoy exclusive benefits across both programs. Additionally, our relationship with Lindblad Expeditions, a global provider of expedition cruises and adventure travel, provides members with access to transformative experiences in hard-to-reach locations around the world while being rewarded.

Another way we are caring for members is our alliance with Small Luxury Hotels of the World, which allows members to earn and redeem points and enjoy on-property benefits at more than 250 participating hotels, including new locations across both Europe and Asia.

SkiftX: Is there an opportunity for World of Hyatt to extend its appeal beyond travelers to new audiences (for instance, local residents), or to fulfill new types of needs?

Weinberg: We recognize that in order to foster loyalty and use our scale to our advantage, we have to remain nimble and focus on delivering more personalized care and unique experiences that touch our members in all aspects of their lives — both in and outside of hotel stays.

One example of this is for members who have the World of Hyatt Credit Card, offering accelerated point earning on a number of day-to-day activities, including fitness

memberships, dining, and transportation. This means as members go about their day, they can earn two points per dollar spent at the gym, grabbing coffee with a friend, and commuting to work. Through the card, members can also earn four points per dollar spent on Hyatt stays and experiences.

SkiftX: Wellness seems to be a growing focus for travelers and within hospitality. What are some ways you're integrating wellness into World of Hyatt?

Weinberg: Our commitment to well-being is aligned with our purpose of care and our landmarks of well-being: Feel (your emotional and mental well-being), Fuel (power your body, inclusive of things like food and sleep), and Function (how you move and function in work, life, and play). We know members choose us for a variety of reasons — some may be traveling to immerse themselves in the destination and recharge, while others are looking to simply maintain their routine while on a business trip, and some want to experience something new while enhancing their mind and body.

One example is our FIND platform, which is embedded in our landmarks of well-being. The platform offers over 200 curated, member-only experiences around the world, where members are able to earn and redeem points for these experiences whether staying with us or exploring their hometown. ♦

Amy Weinberg ▶
Senior Vice President,
World of Hyatt



SUBSCRIPTION TRAVEL IS THE NEXT FRONTIER OF LOYALTY

By Andrew Sheivachman

Illustrations by Vanessa Branchi

 **Skift Take**

Earning consumer loyalty means more than giving them rewards. Subscriptions and memberships represent a compelling way for travel companies to create lasting relationships with consumers.





The travel industry tends to view its products as a must-have for consumers. This mindset has led the sector to lag behind the entertainment and e-commerce world when it comes to building lasting relationships with digital-first consumers.

Travel competes, both as a consumer good and an entertainment product, with services like Netflix, Amazon Prime, and Facebook. Travel, hospitality, and experiences represent the antidote to the digital malaise felt in a world where consumers are beset by online shopping and entertainment options.

There is a solution to travel's challenge of achieving daily, direct engagement on digital platforms that leads to real-life purchases, though. Subscription and membership models will come to travel over the next decade, just not how you might think. A points program isn't enough to create loyalty; travel is evolving to embrace a membership model that touches various aspects of the traveler's life beyond the trip.

POINTS BEYOND

Travel companies excel at getting someone from one city to another, giving them a place to sleep, and showing them things to do. Most consumers, though, only travel a handful of days out of their year. Can travel companies become better at building products that customers need more than twice a year?

Smart brands are looking beyond offering points in exchange for a purchase as a model for building loyalty. Consistent engagement is the new loyalty, along with frictionless

access to a variety of products. Travelers who are now more price-sensitive than brand loyal is the relative parity between competitors in highly consolidated sectors.

Brands both big and small are experimenting with an early stage of subscription products. Delta Air Lines is now offering boarding perks for a flat fee each year, for instance, and car rental giants have experimented with a variety of subscriptions too.

Imagine what a travel subscription product could look like if it truly put the customer first, connecting the dots between the disparate travel products in any given destination.

While a company like Inspirato, which offers a few luxury hotel stays a month for a huge monthly fee, may be a successful business, it isn't something the average consumer needs. U.S. airlines have also phased out unlimited passes over the years, much to the chagrin of the smart people who bought in early and enjoyed unlimited travel around the world.

It's unlikely a subscription product for travel will revolve around a monthly fee granting access to unlimited hotels, flights, or experiences. The industry is too fragmented, and consumers travel too infrequently to build loyalty.

Ponder the business potential if travel companies were to leverage the myriad of services and products they offer outside the traditional trip and build partnerships with local providers on services and products they don't offer. A monthly subscription or membership fee would be far outweighed by the value and convenience enjoyed by members. Consumers want access to all

manner of things: hotel services from a variety of brands, restaurant reservations, local experiences, timely deliveries, reliable ground transportation, and compelling digital content — wherever they are or whatever they want to do.

Capturing their bookings when it's time to travel should be just one component of the overall offering. Why can't travel companies shift to accommodate these consumer needs? The inevitable so-called Amazon of Travel will be a service and discovery platform rather than a single company offering compelling products across each silo of the fragmented global travel market.

LIFESTYLE AS A SERVICE

The ongoing debate between access and ownership for consumers of travel hasn't been discussed much. Since the components of a trip are perishable, travel companies are often incentivized to either discount in order to fill seats and rooms or strip out elements of a purchase and sell them back to consumers at a premium. Emphasis is put on revenue management above improving the traveler experience or packaging elements of travel together in a consistent manner.

Nobody recommends a brand to their friends for being the most savvy at ripping them off, though. Points and status, too, have lost their luster and don't offer solid value back to the average customer.

Travel companies, excluding TripAdvisor, perhaps, have yet to crack the code of building a direct relationship with customers over digital platforms on a daily basis. TripAdvisor's power stems from its user-

generated restaurant reviews, which lead consumers to its travel products.

Travel companies have a major differentiator from online services and direct-to-consumer brands: They are physically present in thousands of cities, ranging from the world's travel hubs to small towns in rural areas.

The travel industry's existential challenge over the next decade is to find a way to bridge the divide between physical products or experiences and the digital-first environment in which global consumers spend their time.

As consumers shop on mobile devices, they are also consuming content from a variety of sources like Netflix, Instagram, Amazon, and countless others. The ingrained notion that the travel inspiration and purchasing phases of the customer journey are somehow sealed off from the other things consumers consume is laughable.

Consumers who buy into subscription services are committed beyond just a one-time purchase, enjoying access to products however it fits into their lifestyle. This freedom engenders loyalty, even if customers aren't always rewarded for individual purchases or consumption patterns.

Direct-to-consumer brands have been particularly successful at navigating this phenomenon. Branding, user experience, and the products themselves represent an aspirational experience and lifestyle consumers are attracted to.

Travel doesn't even come close to the utility and convenience of these products when viewed through this lens. New platforms, and new products, are hooking the consumer of the future today. ♦

Tourism's New Competitive Advantage Is Protecting — Not Just Promoting — Destinations

By Rosie Spinks

Illustrations by Min Liu





Skift Take

Responding to the burden that tourism can bring requires more than tacking on the idea of management to tourism boards' activities; it requires a paradigm shift in how destinations operate. That shift is under way.

It seems almost quaint to think that, not too long ago, the job of tourism boards and destination marketers could be described so simply: Get more people to visit your destination.

In an age where local residents from Barcelona and Venice to Boracay Island are protesting tourism itself, measuring success by swelling visitor numbers no longer feels relevant. The holy grail of a sustainable yet lucrative tourism industry has, by definition, come to mean tourism that local residents and stakeholders feel good about too.

Realizing this goal presents myriad challenges. Tourism boards and destination marketers have very different configurations around the world, including government agencies that can set 10-year plans (and allocate the resources to achieve them) and private-sector membership bodies that exist solely to help the bottom lines of their profit-motivated members. In addition, many of the destination marketing outfits — creative and committed as they are — don't have the

expertise or resources to effortlessly adapt to a management-based approach overnight.

The trendline is crystal clear: Destinations that are to remain competitive and attractive to visitors for years to come will have to start protecting their communities and cultural capital now. This shift in approach requires reimagining the way that destination marketing and management intersect — as well as incorporating the concerns of local stakeholders into the tourism boards' strategic planning.

RETHINK THE GAME PLAN

Management has become something of a buzzword used by destination marketers around the world to signify that they are woke to the age of overtourism. The prevalent myth that destination marketers can seamlessly become managers without new resources or funding models, however, is part of why overtourism has become such a problem, said Kevin Molony, the co-founder

of the New Orleans Sustainable Tourism Task Force. The organization is an independent group of citizens that began working with stakeholders as well as city and state leaders in 2018 to try and alter the community's approach to tourism.

Molony thinks it's clear that "tourism marketing should exist under the umbrella of tourism management, never the other way round," and that the community has to be involved in deciding what kind of tourists they want to attract.

Randy Durband, CEO of the Global Sustainable Tourism Council, said some of the best examples of a management-over-marketing approach right now come from smaller, emerging destinations looking beyond visitor numbers to include average length of stay, amount of money spent, and guest satisfaction level as key indicators in defining success.

One example is the Thompson Okanagan Tourism Association in British Columbia, Canada. The group decided to split its resources, with 60 percent going to development and planning and 40 percent going to promotion. "The fascinating thing is that they've increased their number of visitors, length of stay, average spend — and they've improved relations between First Nation indigenous people and the greater majority white community," Durband said.

On the other end of the visitor numbers spectrum is Holland, in particular Amsterdam, which is perhaps the overtourism poster child that has done the most so far to reverse course. The Netherlands Board of Tourism and Conventions (NBTC) Holland Marketing,

THE HOLY GRAIL OF A SUSTAINABLE TOURISM INDUSTRY IS ONE THAT RESIDENTS FEEL GOOD ABOUT TOO.

the country's destination marketing group, is making sure that marketing is just one of its four pillars: intelligence and insights; strategy and branding; destination development; and then marketing.

Notably, shifting the focus to those pillars has meant reconsidering how the group defines success in its funding agreement with the government. Where once it was strictly about increasing visitors and matching government funding with private sector partnerships, now NBTC Holland Marketing managing director Jos Vranken said that the public sector goals have to diverge

somewhat with private sector partners. “There was always a perfect alignment between public and private interest because everyone wanted to see more visitors, but the long-term scope and the nature of challenges of the destination mean public and private interests tend to diverge a little more than in the past,” Vranken said. He added that he hoped this divergence would only be short-term as new partnerships develop.

TOURISTS VS. LOCALS

Perhaps the biggest indicator of how sustainable a destination is is how its residents feel about tourists who visit. In western Europe, the public sector is increasingly using digital platforms to solicit feedback from local stakeholders — including local business and in some cases residents — according to European Tourism Association Secretary General Tim Fairhurst. In Slovenia, regional destinations that want to participate in the nationwide Green Scheme of Slovenian Tourism certification system must survey their local community every three years regarding the public sentiment surrounding tourism.

In Holland, Vranken said that the tourism board is helping its stakeholders “look at tourism no longer as a goal in itself but as a means to various ends.”

While those ends differ depending on the region — and depend on regional destination marketing organizations’ goals — the hope is that policy makers and businesses “look at solutions and developments that tackle not just tourism industry and future guests but have a more multifunctional purpose that

includes residents.” It also means inviting residents to co-create tourism policies.

Fairhurst echoed this, saying the best destinations “don’t develop stuff for tourists, they develop stuff for people.”

MAXIMUM CAPACITY

A decade on, what today feels something of a taboo in the tourism world — openly admitting that there is actually an upper limit to the amount of tourists who can visit a destination — will likely be a baseline assumption of a sustainable destination. As Vranken said, that will depend on having the appropriate data and metrics.

“The answer is absolutely yes, there is a carrying capacity, but in order to measure it we have to establish a body with the authority and funding to measure it,” he said.

This future will also likely depend on governments prioritizing sustainable tourism management as a policy priority. In the U.S., destination marketing organizations like Visit Florida are still more likely to be fighting for their lives than planning how residents might feel about tourists 10 years out. It’s difficult for these organizations to come up with nuanced plans if their concerns can hardly go past the next funding cycle.

In order to truly invest in protecting a destination’s future — for the enjoyment of tourists and residents alike — tourism officials and governments are starting to work in cohesion, rather than at odds.

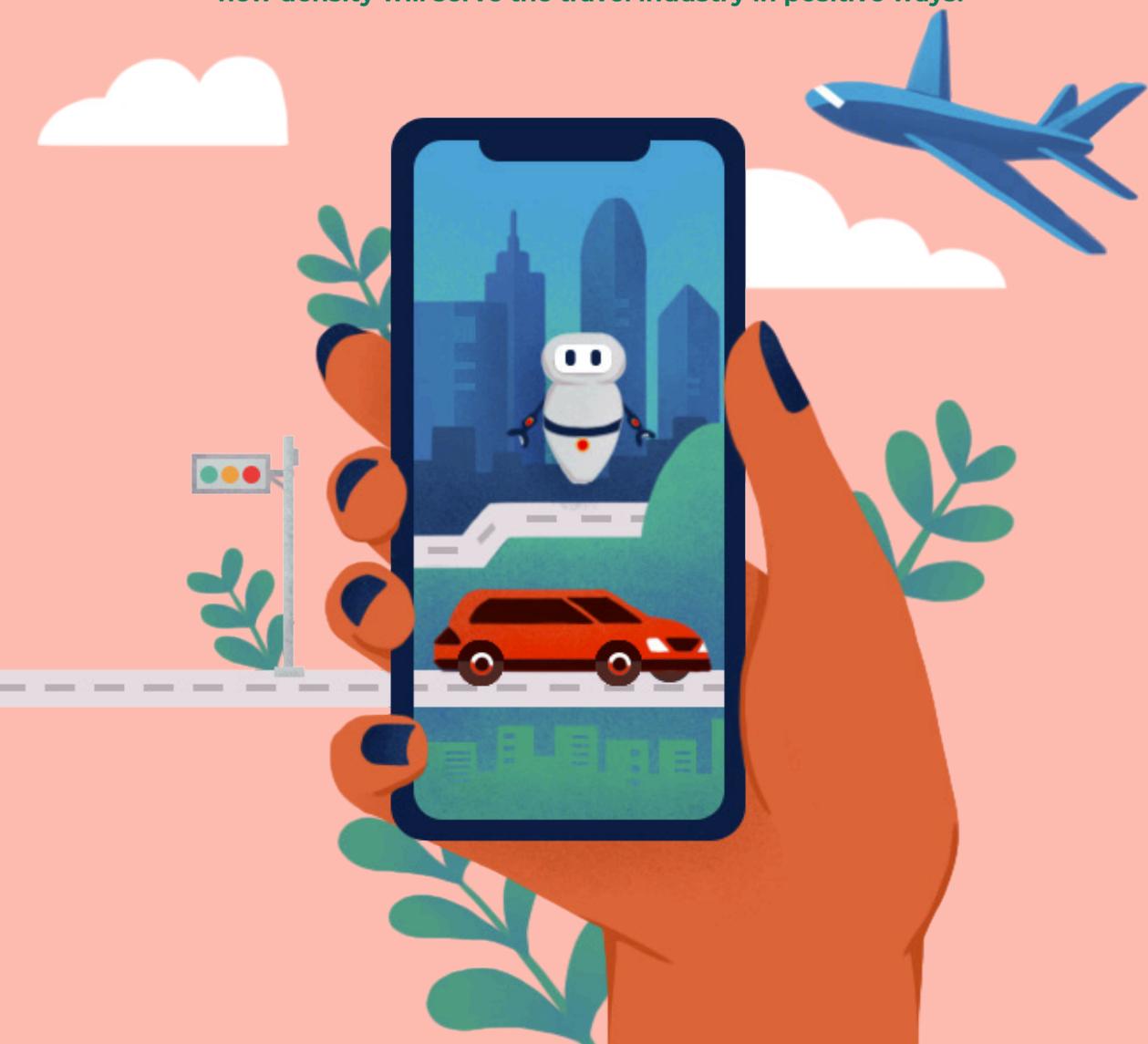
The time to start doing this was yesterday. ♦

The Future of Travel Will Be Driven by Urban Living Innovations

By Andrew Sheivachman / Illustrations by Melody Shih

 SkiftTake

Cities have always been incubators for innovation, but with two-thirds of the world's population expected to live in urban areas by 2050, developments being rolled out today to accommodate that new density will serve the travel industry in positive ways.





As travelers both seek experiences that reflect the unique characteristics of the places they visit and desire the comforts of home while abroad, cities making the strongest and smartest investments in new models and concepts of urban living have become more attractive destinations.

As city life changes, so too does the experience of visitors who contribute to the local economy and, increasingly, look for modern conveniences during a trip. Travelers want an experience curated for their particular needs and not the one-size-fits-all attitude of the big-box hotel or generic shopping district.

With the professionalization of short-term rentals and the popularization of co-working spaces, the desirability of an urban travel destination is often tied directly to quality of life and convenience for visitors. The United Nations projects that 68 percent of the world's population will live in cities by 2050.

Destinations are making investments and design choices today that will determine their competitiveness for both vacationers and business travelers deep into the future, whether it's using robotics for interiors to optimize tight-living spaces — think hidden closets and moving beds — or creating more efficient and green common areas.

Some critics of this urbanization movement say it creates a flattening effect, removing a place's unique edges and putting a boring, inauthentic familiarity in its place. It raises property values, pushing out longtime residents and replacing well-established neighborhood businesses with international

chains and pricey boutiques aimed at travelers and the wealthy. Others contend that urban development is ultimately a good thing for local businesses and the people who work for them.

TRANSFORMATION AS ATTRACTION

Many of these innovations, however, become tourist magnets in their own right, showing visitors not just a stunning building or gorgeous park but a new way to live. With an increasing number of global inhabitants flocking to cities, change is needed for cities to adapt to larger populations and the various needs of their business communities.

As travel sector infrastructure continues to develop in cities around the world, it will need to do so in tandem with other elements of urban development. Travelers use public transportation, frequent restaurants, and buy staples from neighborhood markets. The idea that both locals and visitors want a sanitized version of city life is false, of course, but the impact of global corporations and chain businesses has proven to be destructive when not approached with care from government officials. Smarter airports serve both locals and visitors as well, providing a boost to local economies.

Dynamic cities are always in flux, yet smart technology and creative design can help a city punch above its weight as an attractive destination for visitors — and those innovations will be adapted by travel companies elsewhere beyond cities. >>

CITY AS MAP FOR THE FUTURE

As sustainability becomes a major differentiator for travelers, the impact of smart urban design can't be overstated. Most travelers today want the destination that they visit to reflect their personal values, according to Skift Research, and this is likely to intensify over time.

The innovations in cities like Tokyo and Rotterdam have now spread to secondary cities and others.

New developments routinely bring members of the global creative class and knowledge economy to districts and cities, creating the opportunity for visitors to meet and build relationships with those involved in their professional fields in a more organic way. This compelling social culture is crucial to the future of destinations not just for tourists, but the global business community.

New boutique hospitality brands are entering markets with properties that fit not only local aesthetics but attitudes. Big chains are looking to provide hotel guests with local services as a trusted intermediary using digital platforms while also serving up hospitality services to locals.

These changes, however, have not come without backlash. Alphabet's Sidewalk Labs project has drawn criticism for its plans to revitalize Toronto's waterfront district; its proposed data collection to develop services (like apps) has been eliminated by the city.

Yet it's easy to see how cutting-edge architecture and design proposed by the project would reward travelers in the future. Energy-efficient homes, smart sewage

systems, and automated traffic patterns would reduce costs for residents.

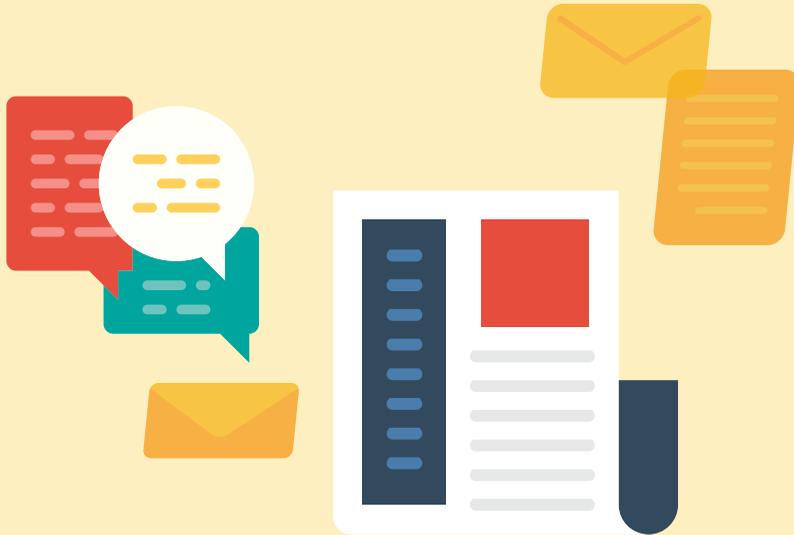
More cities are experimenting with closing popular thoroughfares to vehicle traffic, reducing congestion while bringing street life back to neighborhoods that have become more stagnant to accommodate drivers and parking. While drawing ire from those with cars, these changes benefit street life by making way for other forms of transit and creating more foot traffic for businesses.

LIFE IN THE 21ST CENTURY

As mixed-use developments become more popular, so too they increase the ability of destinations to provide a compelling experience for travelers while serving the needs of residents. Developments in experiential retail when combined with mobile-first services and direct-to-consumer brands bring convenience for local shoppers and peace of mind for visitors.

New residential models, as well, combine traditional apartment living with the sharing economy by streamlining the process by which renters and owners alike can list their home on Airbnb or another platform. By designing properties with common spaces and shared utilities, these new concepts create the space to better regulate homesharing while enabling travelers to have a more comfortable stay depending on their personal needs.

Taken as a whole, these various innovations represent the strategy for urban destinations to become more compelling to vacationers and business travelers alike. It's not necessary to build a smart city, but a more creative one whose smart choices can be replicated across the globe. ♦



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AUGMENTED HOSPITALITY IS CHANGING THE WAY WE EXPERIENCE CITIES

Skift Take

As new concepts of urban living evolve and cities become even more attractive destinations for both working and living, hospitality brands will need to rethink the role they play for visitors and locals alike.

One company rethinking how its properties and services are developed and deployed in cities across the globe is Accor. Not only is the brand transforming its core service offering, it's also redesigning the brand around new services, collectively referred to as "augmented hospitality."

Augmented hospitality has been explained by Accor executives as a refined vision of hospitality that focuses on tailor-made services offered to a wide breadth of consumers. The goal is to deeply understand consumers and offer travel and lifestyle experiences that are clustered into three categories: Live, Work, and Play. According to the brand, "Augmented hospitality means anticipating a customer's every need. Whether organizing upscale events, delivering personalized services, creating unique experiences, or offering digital solutions, Accor's vision of augmented

hospitality is not just about planning for tomorrow, it is about designing tomorrow."

To understand more about this evolving vision, SkiftX spoke with Ian Di Tullio, senior vice president of guest services at Accor. As the head of customer strategy, Di Tullio is responsible for the broad functions of customer acquisition, engagement and experience, loyalty, and global partnerships. Di Tullio is heavily involved in the transformation of Accor into a customer-centric organization that is using loyalty and partnerships as a catalyst for augmented hospitality.

SkiftX: In 2018, Accor's chief digital officer Maud Bailly introduced the vision for augmented hospitality as the ambition to make your hotels "life companions" to customers through daily services for both guests and locals. This is aligned with Accor's growth strategy. How has augmented hospitality

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evolved since then, and how will augmented hospitality continue to change the way we experience cities?

Ian Di Tullio: As Maud Bailly, chief digital officer in charge of digital, distribution, sales, and information systems at Accor, alluded to in her 2018 exchange with Skift, Accor has been busy transforming its core service offering to truly provide an augmented hospitality experience to its local and global customers alike. Whether through the expansion of its co-working footprint, the continued evolution of daily life services, its entertainment, food and beverage, and experiential assets, to name just a few, Accor has increasingly aligned its value proposition to reflect the needs of the ever-evolving customer.

However, augmented hospitality itself continues to evolve with customer journeys, often crossing over between industries. This blurring means that augmented hospitality is increasingly about understanding and emulating life and connecting touchpoints to accommodate more holistic customer journeys.

As the value propositions of the brand and its partners continue to expand and converge, so does the opportunity to further impact how cities are experienced digitally and physically by making the ability to navigate these opportunities simpler and more fluid across an increasingly large playground. What this means is that proposed customer experiences will be better curated based on their particular needs — but through our enhanced presence in these verticals, these experiences may also be higher touch than simply digitally delivered content.

SkiftX: Can you give an example of how this plays out in a city like New York or Paris?

Di Tullio: In a city such as Paris, where we increasingly see ourselves as a leading lifestyle brand, our customers can benefit from our ever-expanding portfolio of experiences whether they find themselves in live, work, or play modes.

Our co-working space, WOJO, continues to expand its properties for the “work” part of the day. While in live or play modes, our customers can find an expanding subset of dining, lounge, or nightclub options inside and outside our hotels.

Our partnerships with the Paris Saint-Germain Football team, the Accorhotels Arena — one of the biggest entertainment venues in Europe — and events such as Taste Festivals or the tennis tournament Roland Garros allow our guests to amplify their experiences based on money-can't-buy experiences in our VIP lounges. And with the recent introduction of partnerships in the airline vertical, we are able to connect with customers more upstream in the travel journey.

SkiftX: Is the idea of augmented hospitality mainly around leisure and lifestyle, or does it extend into business travel as well?

Di Tullio: Augmented hospitality extends to all types of travels. The notion that customers constrain their behaviors according to these traditional trip segmentation types is obsolete. Customers in all types of travel modes exhibit a combination of business, leisure, and lifestyle behaviors, or what we call Live/Work/Play.

Business customers cross over into leisure, while leisure customers conduct business seamlessly. In many cases, the line between both worlds is blurred at best. It is why we need to have a wide array of experience options to answer each set of needs, based on customer moments.

SkiftX: Outside of travel, business itself is changing, especially within cities. The rise of 5G internet, flexible hours, remote work, and co-working spaces are setting the stage for a more mobile workforce. What does the future of work look like in the next five years?

Di Tullio: The future of work is more flexible than ever. It is thus not surprising that we see a further blurring of the lines between business and leisure and the worlds of live, work, and play with this increasing flexibility. The future in the next five years largely consists of further consolidation — either formally or informally — in activities and/or organizations that contribute to delivering on the expectations that customers have of augmented hospitality.

At Accor, we truly believe that places will become hybrid. It has already started — we already have properties that serve as a hotel for travelers, a co-working place for locals via our branded workspace, WOJO Corner, and a restaurant at night. It's difficult to say what we'll see in five years' time, but the city densification will undoubtedly push the hospitality universe to adapt their offerings.

SkiftX: So the reality is that the way we work, live, and play are converging. What are Accor's plans to address this in 2020?

Di Tullio: This convergence is the main reason why we are rolling out our new ALL, or Accor Live Limitless, loyalty program in January 2020. This new program not only addresses some of the historical pain points of frequent travelers, but also provides additional opportunities to be recognized outside of their stays throughout their daily lives.

More specifically, the program will expand to include 12 additional hotel brands worldwide, will introduce two new status levels and new benefits such as upgrades and best price guarantees, and will provide our customers with the ability to earn and use their points during visits to our bars and restaurants. The new program comes with a completely new online experience via a new website and mobile app that will allow us to introduce additional improvements much faster. Of course, this is only the beginning. Check it out on all.accor.com. ♦

Ian Di Tullio ▶
Senior Vice President of Guest Services,
Accor



Gen Z Asserts Itself as Travel's Next Big Opportunity

By Meghan Carty

Skift Take

The millennial generation has been at the forefront of the collective mind of the travel industry for years. But starting in 2020, Generation Z will begin entering adulthood. The travel industry would be wise to shift some focus here if it wants to stay ahead of the game.

This year the oldest members of Gen Z will be graduating from college and taking up larger portions of the global workforce and population. This generation is already travel-savvy and heavily involved in trip planning. Large numbers of Gen Z travelers around the world soon will have the money and autonomy to take control of their own trips for the first time.

The year 2020 will also be the first full year that we expect Gen Z will take up the largest portion of the global population. Gen Z will have surpassed millennials in terms of global population share sometime in 2019, when it's expected to reach 32 percent of the global population, according to an analysis of United Nations data by Bloomberg.

DEFINING GENERATION Z

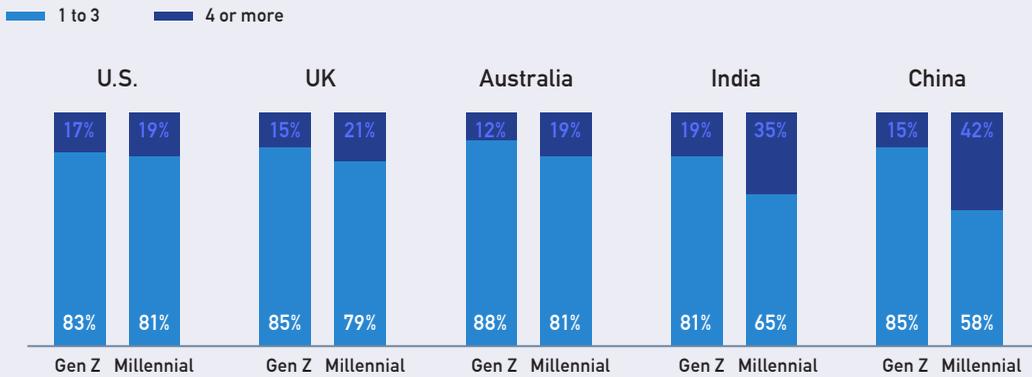
Generation Z—the oldest members of which are about 22 years old right now, with the youngest still to be determined — is defined by the fact that they have been surrounded by technology, like mobile phones and social media, from a very young age if not their

entire lives. As Cassandra Napoli, associate editor and generational trend expert for WGSN Insight explained, “They are growing up in an era of shifting values and huge technological change.” This difference in context means that Gen Z is developing some unique traits and behaviors that are made even more distinct by their country of residence. These contexts will only set this generation apart further as they mature and gain more independence.

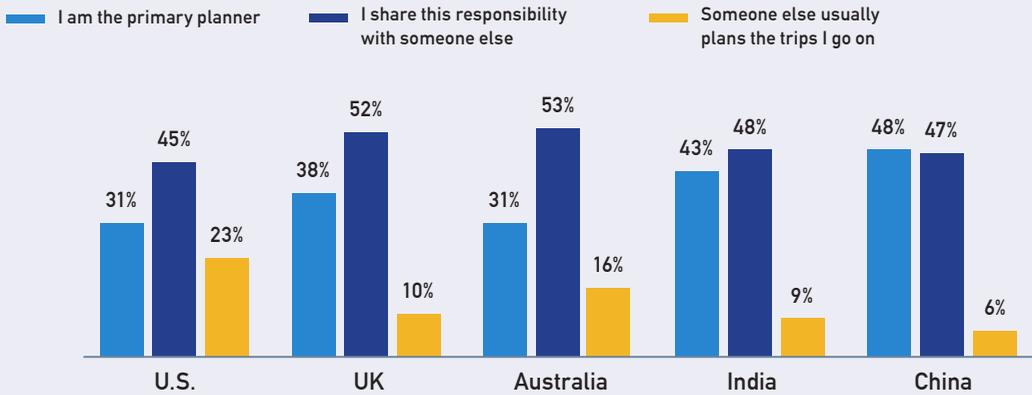
GEN Z ALREADY TAKES AN ACTIVE ROLE IN TRAVELING, PLANNING AND PAYING FOR TRIPS

It will take some time to see the true preferences and behaviors of Gen Zers, but a Skift Research survey fielded in July 2019 in five different countries revealed that members of Gen Z are traveling at relatively similar rates to their millennial peers in most countries. >>

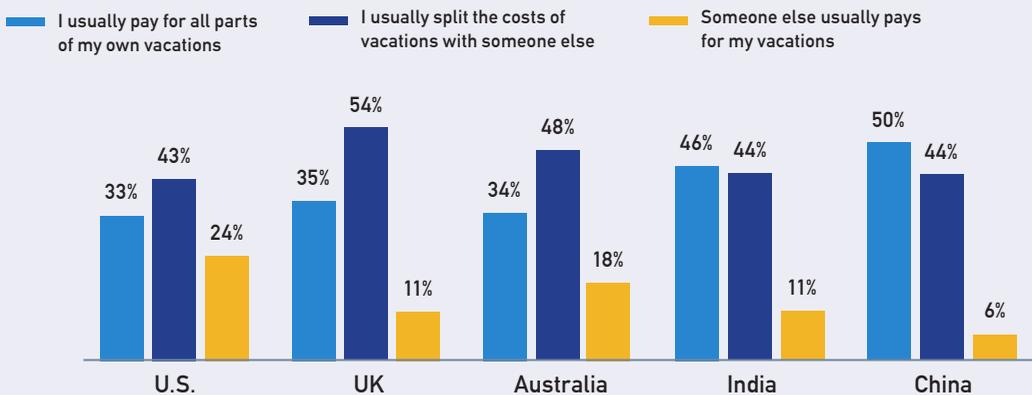
How many leisure trips have Gen Z and millennials taken in the last 12 months?



For a typical leisure trip, how much responsibility do Gen Zers have in planning?

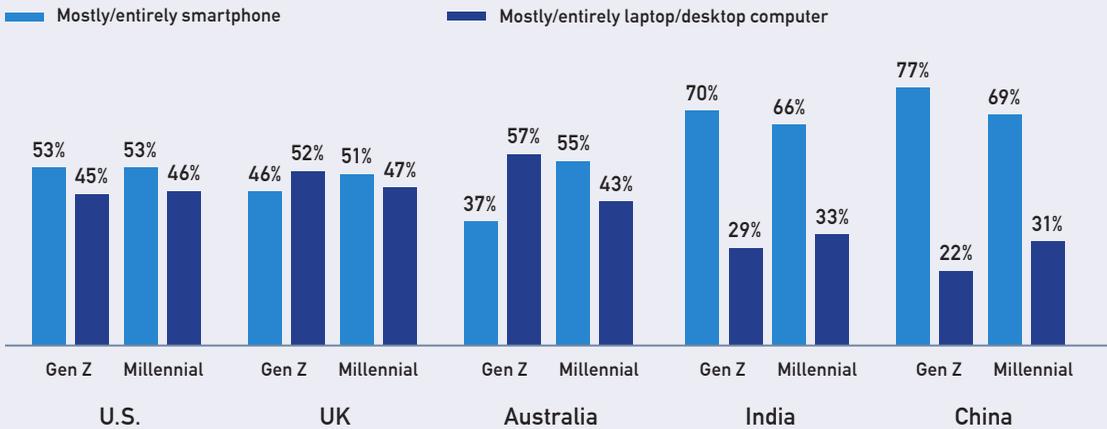


What role do Gen Zers have in paying for the different parts of vacations?

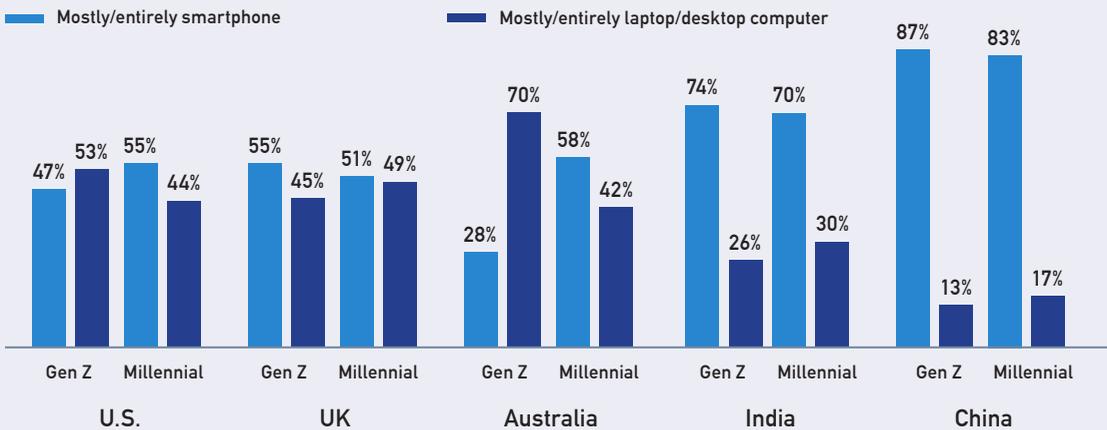


Source: Skift Research

What devices do Gen Zers and millennials use when researching and planning a trip?



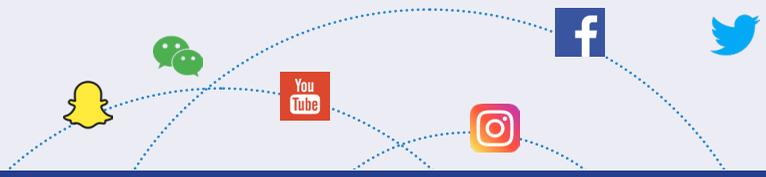
What device do Gen Zers and millennials use to book vacation activities?



Source: Skift Research

Gen Zers might be following in the footsteps of millennials when it comes to mobile usage, but in other ways Gen Zers are charting their own path — and truly going their own way. WGSN Insight’s Napoli explained that members of “Gen Z are digital natives, have depleting attention spans, desire personalization, and have a love-hate relationship with connectivity,” which makes them stand apart from millennials.

These differences are extremely visible when it comes to social media use. While Facebook is a top choice among millennials in all countries except China, where the site is banned, it only appears in the top three among Gen Zers in Australia. Instead, the visual-laden and bite-size-video-heavy platforms of Snapchat, YouTube, and Instagram are capturing more of the screen time of the younger generation.



A Comparison of Gen Z and Millennial Social Media Preferences

	U.S.		UK		Australia		India		China	
	Gen Z	Millennial	Gen Z	Millennial	Gen Z	Millennial	Gen Z	Millennial	Gen Z	Millennial
1	YouTube	Facebook	Instagram	Facebook	YouTube	Facebook	WhatsApp	WhatsApp	WeChat	WeChat
2	Snapchat	Instagram	Snapchat/ YouTube	WhatsApp	Instagram	Instagram	YouTube	YouTube	QQ	Sina Weibo
3	Instagram	YouTube	Twitter	YouTube	Facebook	YouTube	Instagram	Facebook	Sina Weibo	QQ

Differences like these are revealing themselves all the time and are crucial for travel companies to be aware of if they're hoping to capture a slice of the Gen Z pie. The Airline Tariff Publishing Company, also known as ATPCO, is the airline-backed tech organization that is tasked with helping the industry run more efficiently. It's already thinking about how to engage Gen Z flyers based on the unique behaviors they're displaying. At the organization's conference in October, a panel explored the importance of connectivity and autonomy to this ultra-connected generation and how airlines need to prioritize rich, mobile-first content, with Gen Z's preferred social channels in mind.

It's important to keep in mind though, that while strategizing around generational cohort trends is a useful place to start, brands need to also realize additional context, like country of residence and life stage, that often provides more clues about behavior and preferences. For Gen Z, this nuance might be particularly important. As Napoli cautioned, "Remember, they expect personalization, so lumping one strategy to reach the entirety of this group will not work."

SO WHAT'S NEXT FOR GEN Z?

As members of Gen Z fully enter adulthood in the next decade, they will have greater autonomy over their travel decisions, and as their spending power increases, so too will their ability to travel. The oldest Gen Zers by 2030 will be in their 30s, and many will likely have children by then, bringing Gen Z family travel onto the radar of the travel industry.

It will take time for us to see the real travel behaviors and preferences of Gen Zers as they continue to come into their own. Unlike millennials, however, Gen Z travelers will continue forging their own path when it comes to digital behavior, especially as they continue to come of age in an era wrought with privacy concerns and scandals involving Big Tech and social media companies.

Gen Z is already giving us a look at where it's heading, and as the decade progresses, we will know as much about this generation as we do about millennials today. As 2020 gets under way, travel companies that want to remain a step ahead will need to keep their eye on Gen Z. ♦

Wellness Travel Makes Aging Aspirational

By Leslie Barrie / Illustrations by Min Liu



Skift Take

Wellness travel isn't just for the 20-something yogi anymore. Companies are looking at aging as a big opportunity, leaning further into transformational travel with a focus on mind and spirit. There's a whole lot of people growing old and living longer while trying to figure that all out. Travel is seeing a chance to help unlock the mysteries.

A decade ago, if you were having a midlife crisis, you'd buy a new car, get a new haircut, or maybe pick up a new hobby.

But these days, turning 50 — or whatever age you deem “midlife” — isn't what it used to be. A new wave of adults are eschewing the gadgets, luxury home remodels, and beauty treatments. Sensing this shift, travel is helping to reframe aging, longevity, and what it means to be at midlife.

Instead of offering ways to stave off the inevitable physical decline (think fasts, juice detoxes, or pilates retreats), travel companies are offering new and innovative ways to address the mind and spirit. Whether through new elder academies, so-called wellness sabbaticals, or universities offering

new programs tailored for midlifers, the demand is growing.

The United Nations projects the global population who will be over the age of 60 is expected to more than triple to 2.1 billion by 2050. That will create even more demand.

PATH TO DISCOVERY

So what is the appeal of wellness travel in midlife? In a way, it comes from the great unknown. “This particular age bracket is often still figuring out what wellness means to them since for many, self-care and mindfulness were not as openly discussed and embraced as they are today,” said Tom Marchant, co-founder of luxury travel company Black Tomato.

That can make wellness seem like an exciting new frontier for boomers and older Gen Xers. The travel industry has picked up on this new target group of wellness travelers looking to transform themselves at midlife.

For one, the Elevation Barn, founded by the creator of the C2 festival in Montreal and now in five countries, is focusing on how successful people in their 40s and 50s can repurpose themselves. It pitches itself to industry leaders as helping them to “gain clarity on your next chapter.”

WELLNESS ED

To address the mental side of entering midlife, the concept of a “midlife wisdom school” has started to percolate. “The goal is to address the universal need for a pause in midlife, so that people can approach the latter parts of their lives with newfound curiosity, energy, and relevance,” said Chip Conley, a travel entrepreneur who coined the Midlife Wisdom School concept.

Conley started the Modern Elder Academy in Baja California Sur as a holistic way, he said, to help reach people going through the often challenging transition from midlife to elderhood. “The intent is to help people shift their mindset when it comes to aging.”

What’s considered middle age these days is up for debate. Conley argues that those who live and work near Silicon Valley, Hollywood, or Madison Avenue may start feeling middle-aged in their mid-30s. “As power in a digital society cascades younger, and more of us are going to make it to 100, it might be that midlife lasts from 35–75,” said Conley.

Universities, too, are addressing this trend — Stanford University has its Distinguished Careers Institute (with its pillars of wellness, purpose, and community), while Harvard

University offers its Advanced Leadership Initiative. Their programs have become tourist destinations for those in middle age.

Wellness travel brands are also rolling out longer, multiweek programs with a bent on life-changing, holistically immersive “wellness sabbaticals,” according to the Global Wellness Institute.

“The growing social science research on the U-curve of happiness (with midlife at the bottom) reinforces the narrative that midlife is a period of time when many people want to hit the reset button,” said Conley.

This digital era we live in can make the world quite lonely — and loneliness can be a source of health problems, from depression to heart issues. For some, it might take until midlife to realize a void of in-person connection.

Certain travel outfitters are addressing this lack of connection in the modern era, focusing on trips with like-minded individuals looking for shared experiences. Prior, a luxury travelers club, hosts gatherings at its Nomadic Clubhouse sites, where members take over a hotel and come together to experience a city, its local fare, and culture.

Travel has always been there to help celebrate milestone life events: the backpacking trip to South America after graduation, the European getaway to propose to your intended, or the two-week trip through Asia to celebrate a job promotion.

The realization that you may have more yesterdays than tomorrows is less defined, but it is still seminal. It makes sense that a trip geared toward getting a better handle on the stresses that come with this period would be on a traveler’s agenda. Now it’s just a matter of which wellness travel industry players will get the biggest share of the growing legions of midlife customers. ♦



MOVING BEYOND DEMOGRAPHICS: DATA DRIVES THE FUTURE OF TRAVEL ADVERTISING

Skift Take

The world is awash in data, but as consumer skepticism about Big Tech is on the rise, travel brands need to rethink the way they use information to generate hyper-relevant offers. The winners will hit the right mix of helpfulness and relevance, evolving beyond personalization to forge even deeper and more meaningful relationships with consumers.

The average traveler spends 53 days looking at 28 different websites before they make a travel purchase, generating huge volumes of data about likes, dislikes, travel dates, brand preferences, and shopping habits. Multiply that by the average of five trips a U.S. traveler takes annually, and you get a sense of the wealth of data that brands can amass to understand the "why" behind consumer decisions. With that "why," brands can go beyond standard demographic data that shows "who" a user is and create a customized advertising experience that focuses on what they want and what drives their decisions, resulting in more relevant advertising, increased sales, and more satisfied customers. But knowing where to find that data, and how to best harness it, remains challenging.

Digital marketing and advertising tools have evolved rapidly, leaving many travel companies behind. That old marketing cliché of "every traveler is unique" has given way to the more interesting reality that,

to paraphrase Whitman, travelers contain multitudes. Today, digital marketing should focus less on one-to-one tactics and more on using deep data sets to create a dynamic understanding of individuals and their changing motivations, said Miguel Flecha, managing director of travel at Accenture. After all, the same business traveler who flies to Chicago twice a month also vacations in Mallorca, spends a long weekend with friends in Austin, and is planning a cruise with the in-laws and grandparents. Who exactly is she? It depends on the use case. Her behaviors, interests, and motivations change rapidly. Brands need to know her beyond her demographics — and be agile as her motivations change — in order to deliver the most effective marketing messages.

The era of the blunt algorithmic recommendation — of "because you bought X, you might like Y" — seems to be coming to a close, as many sectors, including travel, grapple with massive data sets and consumer concerns over user privacy. Instead, more nuanced recommendations, which feel like

what you'd get from a close friend, are on the rise. "What many consumers ultimately want is for digital advertising to have the same social intelligence as a familiar salesperson in their favorite store — one who can tell from the expression on their face that they're in the mood to splurge or that they're in a hurry because it's a Tuesday night and they need to get home to dinner," according to a recent Accenture Interactive study.

Consider the example of retail, where direct-to-consumer (D2C) brands are offering customers a curated experience, a strong relationship with the brand, and often a higher-quality or more economically priced product. It's a better experience for the customer, but brands also see benefits from the D2C model: They're able to establish a direct relationship with the consumer, inspire loyalty, and gain higher margins by cutting out the middlemen. Travel brands are beginning to use similar tactics by improving their own apps and mobile sites and building stronger loyalty programs. The stronger the relationship a brand builds with its consumer, the better it's able to anticipate her motivations and deliver relevant digital advertising, grounded in layers of data, that does feel customized at scale.

The trick is replicating that relevance online through automated technologies — at a time when consumers are on the fence about sharing even more of their own data. Still, "brands that treat data collection and data strategy as part of the consumer experience can benefit from greater consumer willingness to share information," according to the study. About three in four consumers (73 percent) said they'd "be willing to share more personal information if brands are transparent about how it is used," up from 66 percent in 2018. When brands are transparent about how and why they collect data, and when they use it to power better customer experiences, it's a win-win for both sides.

While a similar level of ownership over the consumer relationship isn't possible on platforms like Facebook, Google, and Twitter, these walled gardens do provide more data and access than travel brands get through more traditional channels, including online travel agencies. They also aggregate demand, reaching a consumer when they're searching and ready to make a purchase, as well as helping to guide and inspire them before they start planning a trip. It's not a direct relationship, but it gives brands access to consumer mindsets even before these individuals show intent. The data available on digital platforms gives brands a richer understanding of people, uncovering behaviors and intent that can't be found with demographics alone. If that platform data is accessed and used in the right way, brands can create a personal, even customized, experience for consumers as part of an ongoing relationship. Nearly nine in 10 people would welcome that level of specificity, according to Accenture Interactive, which found that "87 percent of consumers think it's important to purchase from brands or retailers that understand 'the real me.'"

To get from today's standard to the future of customized travel advertising, brands will need to rethink how they can deliver personal experiences without owning every step in the customer journey. Those companies that use opt-in campaigns, transparent data collection, and flexible data architecture that can respond to new privacy regulations (like Europe's General Data Protection Regulation and California's California Consumer Privacy Act) will be the ones ahead of the curve, said Flecha. Add to that the right mix of third- and first-party data to target customers based on their choices and intent — rather than their demographics — and these travel brands will go from offering personalization to forging deep, multilayered relationships that evolve along with consumers. ♦

Consumer Brands Jump Into Travel With a Hospitality Mashup

By Nancy Trejos / Illustrations by Min Liu



Skift Take Consumer brands that see the passion of travelers are taking the leap. These brands are becoming hotel proprietors in greater numbers to reach out to millennials, who see travel as a lifestyle experience. Expect more retailers to invade the hospitality space.

Consumer companies in categories such as luxury goods, clothing, and even fast food are repositioning themselves as lifestyle brands with a growing presence in the travel industry.

20s and early 30s who are traveling in greater numbers. Millennials prefer lifestyle brands and non-cookie-cutter hotels that they can show off on social media sites such as Instagram, Twitter, and Pinterest.

The strategy underscores the allure of the travel sector as a way for these everyday brands to engage with new customers — particularly millennials, those in their late

“As lifestyle brands mature, and they look for new opportunities to engage with customers, hotels are a natural extension option as they offer relatively low barriers to entry and

high potential impact,” said Chekitan Dev, a professor at Cornell University’s School of Hotel Administration. “Hotels in crowded and brutally competitive markets co-brand with lifestyle brands to give them that extra oomph to stand out from the crowd.”

Fitness company Equinox, luxury goods giant Bulgari, luxury watch manufacturer Shinola, crystal maker Baccarat, and Japanese retailer Muji are examples of brands that have opened boutique hotels. Luxury group LVMH Moët Hennessy Louis Vuitton this year completed its acquisition of Belmond, which owns or manages 45 luxury hotels, restaurants, trains, and river cruises.

The power of these consumer brand-hospitality mashups is evident. Reservations for rooms at the pop-up Taco Bell Hotel and Resort in Palm Springs, California, sold out within minutes in August.

There will be plenty more opportunities for collaborations or crossover between retailers and hospitality companies. Just look at how luxury brands such as Fendi and Prada turned airports into places to showcase — and sell — their goods.

Luxury sales in airports jumped 7 percent in 2018, according to research by Bain & Company. Department store sales, meanwhile, dropped 4 percent.

K.C. Conway, chief economist at real estate organization CCIM Institute, said in a recent report that by 2025, retailers will have to team up with the hospitality industry and other sectors such as transportation centers to maintain their success.

AS LIFESTYLE BRANDS MATURE, HOTELS ARE A NATURAL EXTENSION OPTION.

“The attractiveness of leveraging hotels is strong,” Conway wrote. “The hotel real estate option provides brand exposure, offers product interaction in high traffic areas, and requires less physical real estate space and labor, which can improve margins to mitigate the rising costs for fulfillment.”

HOTEL AS BRAND DESTINATION

Clearly travel is the place to be for these brands in the coming years, which can still maintain the integrity of their aesthetic and values even while experimenting in other industries. Hotels, in particular, can serve as experiential spaces where the companies can build community and loyalty.

Equinox, known for its upscale gyms, opened its first hotel at the new Hudson Yards retail and entertainment complex in New York City in July. The company plans to build more hotels in Chicago, Houston, Los Angeles, Seattle, and Santa Clara, California. >>

Chris Norton, CEO of Equinox Hotels, said extending into hospitality makes “good business sense” because people have shifted their priorities into mental and physical health. “It connects to the basic wisdom about experiences becoming more important than the purchases of product only,” he said. “If you think of incentive travel, there’s no greater gift than giving someone an experience you never forget versus giving someone a thing. On top of the list of experiences, you always have travel. A huge part of travel is, of course, where do you sleep and eat, and it is some of these experiences that hotels have provided for a long time that manifest themselves more today.”

Jennifer Arnoldt, a retail engagement executive at Taco Bell, said the pop-up hotel was a new and different way for the company to engage with its customers.

“Our design and aesthetic drew on Taco Bell’s vibrant palette to create a unique and flavor-filled destination that was the ultimate expression of the brand,” Arnoldt said. “From hot-sauce-packet-inspired key cards fans got at check-in to a resort-inspired menu served poolside and salon manicure services inspired by iconic Taco Bell menu items, every detail was created for our fans.”

The hospitality industry also benefits from partnering with such lifestyle brands. Fragrance brand Lola James Harper entered into an agreement last year with Accor to debut a hotel in Paris.

“This is an example of a perfect match,” Cornell’s Dev said. “Accor gets to expand its brand footprint into a new fashionable space and at the same time, avoid the impact that

comes from branding new hotels adjacent to an existing one, which can sometimes cannibalize the business of existing hotels.”

CONSUMER ENGAGEMENT

In the overbranded hospitality world, too many brands lack a unique point of view to differentiate themselves from competitors. Aligning themselves with a lifestyle brand even in the amenities that they provide can make for a more memorable stay.

Andrew Leber, vice president at Bedrock Hospitality, which developed the new Shinola Hotel in Detroit, said the brand doesn’t just sell watches. It sells experiences.

“People don’t just want to experience the same product that you can get in any market or any city,” he said. “That’s why all the big brands, the Marriotts, Hiltons, and Hyatts, are either developing or buying out lifestyle brands in order to reach a consumer they haven’t historically reached.”

Shinola is also trying to build a community by partnering with local organizations. The Detroit Symphony Orchestra and the Detroit Opera House have sent performers to sing on Sunday afternoons in the Shinola lobby.

The consumer brands have to be careful about how they present themselves in the hotel industry, though. Running a hotel is quite a feat, and a bad hotel could end up damaging the brand. There will be casualties, of course. But these new entrants with fresh ideas will push hotel incumbents to be more savvy about offering services and products that can capture guests. ♦

Travel Payments Find Path to Painless



By Sean O'Neill

Illustrations by Amanda Berglund

Skift Take

Global payments technology and rules are changing swiftly, led by seamless innovations in Asia that are making life easier for consumers. Travel companies of all sizes are finally taking action in order to stay competitive.

Imagine that you want to sell a travel product — a tour or a flight, let's say — to a customer living in another country. You could accept traditional forms of payment, such as credit cards and corporate cards. But you probably would also want to accept newer types of payment, such as mobile wallets like Apple Pay and Alipay. You might want to provide credit to consumers so they could pay in installments.

To go 21st century, however, you'd have to update your back-office payment processes that date from your father's era. You'll be in good company, though: As the financial

world rapidly evolves, most travel brands are racing to stay current.

Technology is one source of this change, but so is regulation. New European Union rules that come into force December 2020 require changes in cross-border commerce. European regulators are trying to fight fraud by requiring most online payments to go through an additional level of verification called "strong" or "second-factor." The new rules will have a side effect: They'll likely prod many companies to revamp their approaches to payments because modern processes readily comply with the rules.

"The idea that I have one credit card or corporate card and pay a lot of travel things with it, well, that system has had its day," said Simon Barker, CEO of payments technology vendor Conferma Pay. "The travel industry must move to virtual cards, where a business traveler buys each thing with a separate virtual number." >>

Virtual cards lend themselves much more readily to strong authentication. Happily, adapting to the world of digital payments brings a bonus: It also makes it much easier to work with next-generation mobile wallets, such as India's Paytm and China's WeChat Pay. Travel brands need to offer the widest array of payment options to buyers to maximize their revenue. Otherwise some travelers may abandon their bookings rather than complete them because their preferred payment method isn't available.

"2020 is the year that alternative payments will surpass cash and cards for travel industry transactions," said Bart Tompkins, managing director of payments at Amadeus.

Many businesses also are moving to digital-first processes to save time. Many large companies are leaning on expense solutions like TravelBank and Expensify to channel expenses straight from the proverbial cash register to their finance departments, while credit card companies like Brex and Divvy are creating payment solutions to streamline those activities.

Small operators are looking to smooth out and speed up processes with new digital fixes too. A case in point is Mustang Lodge, an adventure skiing lodge in British Columbia, Canada. The lodge's operator recently adopted a new payments system from a vendor called Flywire Payment Solutions. Most of Mustang Lodge's nearly 1,000 bookers for the winter season make the balance of their payments at roughly the same time in an early October crush.

"It made it a lot easier this October to have automated processes to field less calls and spend less hours on handling invoices," said Rob Cloke, an operations manager at Mustang Lodge. "We added a link to our

invoice, which customers clicked and paid online," creating a more seamless experience.

GOING GLOBAL

European and North American destinations are scrambling to adopt Asia-based payment methods to draw in highly coveted Chinese outbound travelers. This digital payments push is gaining added urgency in the United States as many destinations and brands try to salvage market share of inbound tourism in the face of the U.S.' increasingly strict visa policy and the weakening yuan.

Booking.com in 2019, for example, began enabling managers of short-term rental properties to let it collect payments via alternative payment systems like Paypal, Alipay, and Paytm.

"Going global with mobile payments is definitely the future," said Laura Miller, global chief information officer at InterContinental Hotels Group, during an interview at Skift Forum Asia in Singapore last May. "It's going to happen across the board, and the question is which solutions are you going to place your bets on."

French hospitality giant Accor in November 2019 partnered with online seller Alibaba Group to develop digital applications and loyalty programs to appeal to Chinese consumers over the next five years. Alibaba has a travel arm, Fliggy, that will facilitate consumers booking hotels, catering services, and entertainment offerings through Accor. Customers will be able to use Alipay.

One related payments tech area that the travel sector is playing catch-up on is the ability to take contactless payments and payments by QR-style bar code, which are

common outside of the United States, Europe, and Japan. Japan's state-backed railway companies have been adopting point-of-sale scanners from companies like TakeMePay that make it easier to accept the preferred payment methods of foreign visitors.

Alipay in early June announced a partnership with six European mobile wallet services. The goal is to establish a "unified" QR code that allows Alipay users to make payments at any location that already accepts one of the payment services. Chinese travelers will be able to use Alipay across a network of 190,000 merchants, according to Jing Travel. Alipay's inroads in Europe have primarily targeted serving Chinese outbound travelers.

In a turning point, both Alipay and WeChat Pay announced in November that they intend to open up their platforms to inbound foreign travelers visiting mainland China, signaling ambitions on a global scale.

Contactless payments are also more common overseas than in the U.S. and Europe. To keep up, American Express last year made all of its newly issued consumer, small business, and corporate cards contactless-enabled.

LOOKING AHEAD

In the decade ahead, the travel payment landscape may shift in a few ways. One change may be a move to so-called peer-to-peer payments, where a buyer and a seller, neither of whom is a bank, exchange money. If this trend materializes, travel companies may see an explosion in the number of new forms of payment they need to accept.

The standardization of installment payments as a concept is another accelerating trend. One example is Uplift, a financial services

company focused on enabling travel brands to offer consumer loans. The startup in 2019 began enabling airlines like United to sell plane tickets for expensive international trips in monthly installments, and the company raised a \$123 million Series C round that helped to accelerate its efforts.

But other companies, like Affirm, Airfordable, and Sezzle, are heating up the installment payments sector too.

A final trend will be a dropping cost for travel agencies to handle international currency payments. Startups like Airwallex are using technology to help reduce the fees charged for processing overseas transactions.

Companies like Kushki Pagos, a Latin America-based payment platform, aim to help travel brands handle wild currency swings when accepting local payments. Relatedly, companies like Ebix and CashSwap are attempting to help travelers cut the fees for currency exchange.

Facebook's proposed alternative payment system, dubbed Libra, faced headwinds in 2019, with the exit of a half-dozen founding members, including Booking Holdings, Visa, and Mastercard. Still, it remains possible that, over the next decade, new types of currency will become popular.

One promising concept is a "stablecoin" — which, in theory, would take advantage of the so-called distributed ledger technology behind cryptocurrencies like bitcoin but that are tied to major currencies like the dollar, euro, or yuan for more stability.

For now, though, the travel industry has enough changes in payments processing to cope with as it is without contemplating some of these farther-out ideas. ♦

Short-Term Rental Winners Emerge

By Wouter Geerts

Skift Take

The short-term rental ecosystem is getting bigger, which means many winners are set to emerge from the pack. Expect further brand-driven professionalization, more outside investment, and vendor consolidation. Those getting on board will benefit, but is a backlash in the cards?

Airbnb has signaled that this will be the year that it will finally go public. Investors and vendors are jostling for position to benefit from the added spotlight this will put on alternative accommodations. Airbnb itself is also acquiring and investing in companies to ensure a positive outcome.

With the added scrutiny, 2020 promises to see clear winners emerging from this fragmented category.

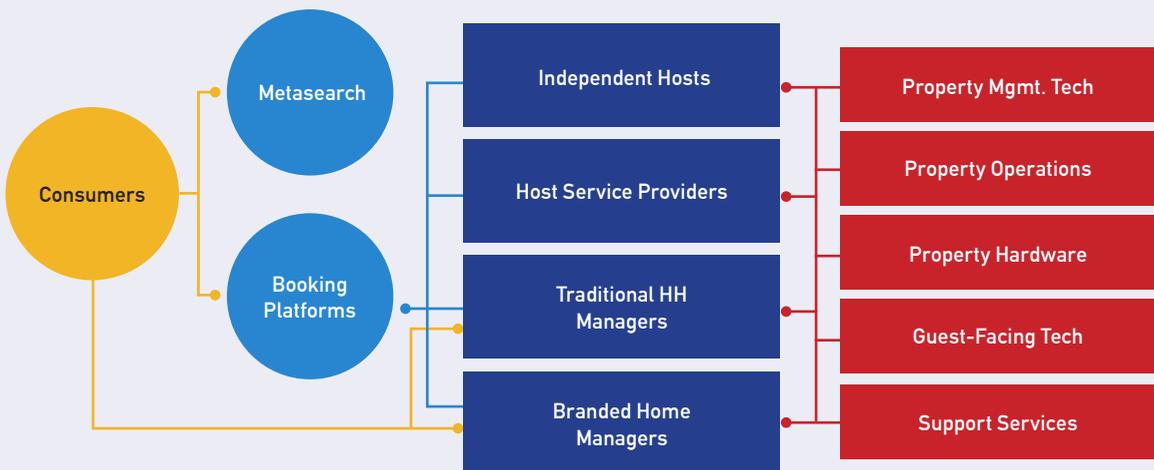
A BOOMING SECTOR

Skift Research estimates that global gross bookings of short-term rental properties grew 7 percent in 2019 to a total of \$115 billion. Five companies — Airbnb, Booking Holdings with its Booking.com and Agoda platforms, Expedia Group with its Vrbo/HomeAway, TripAdvisor, and Chinese platform Tujia — registered 73 percent of all bookings, showing how the booking landscape has become highly consolidated.

In many other aspects, however, the short-term rental sector is extremely fragmented.

The Short-Term Rental Ecosystem

Source: Skift Research



There are millions of independent hosts, over 100,000 property managers, and thousands of business-to-business vendors supporting the renting out of first and second homes, villas, houseboats, yurts, and any other type of accommodation imaginable.

STRENGTHENING BRAND IDENTITY

Branded home managers will find rich pickings in 2020 and beyond. Brand recognition is moving from the online platforms, which will continue to push their brands to attract customers, to on-the-ground branding. Property managers like Vacasa, Onefinestay, and Altido are professionalizing the sector by setting hotel-like standards with exemplary guest communication.

Rather than relying on individual hosts, companies like Sonder, Lyric, Stay Alfred, and Domio, meanwhile, are using master leases, where they lease and convert a partial or entire building to branded short-term rentals.

And it's not just startups and venture capital money driving the growth of branded home rentals. Hotel behemoth Marriott International introduced its own Homes & Villas brand in April 2019.

Dimitris Manikis, president and managing director EMEA of Wyndham Hotels & Resorts, told Skift that "it's very interesting to see what's happening in the branded residences space. I believe more traditional players will go in as time evolves."

Expect more convergence between hotels and short-term rentals as we move into the next decade.

THE OLD GUARD STANDS STRONG

Amid the jumble of venture capital money, it's easy to forget that short-term rentals have been around for decades — and so have property managers. Especially in traditional holiday destinations throughout North America and Europe, holiday home managers continue to benefit from the growth of the sector.

In fact, according to June 2018 to August 2019 data from AirDNA, traditional vacation rental destinations outperformed their urban counterparts. The company asserted that this is largely driven by a trend toward larger, higher-grossing luxury units.

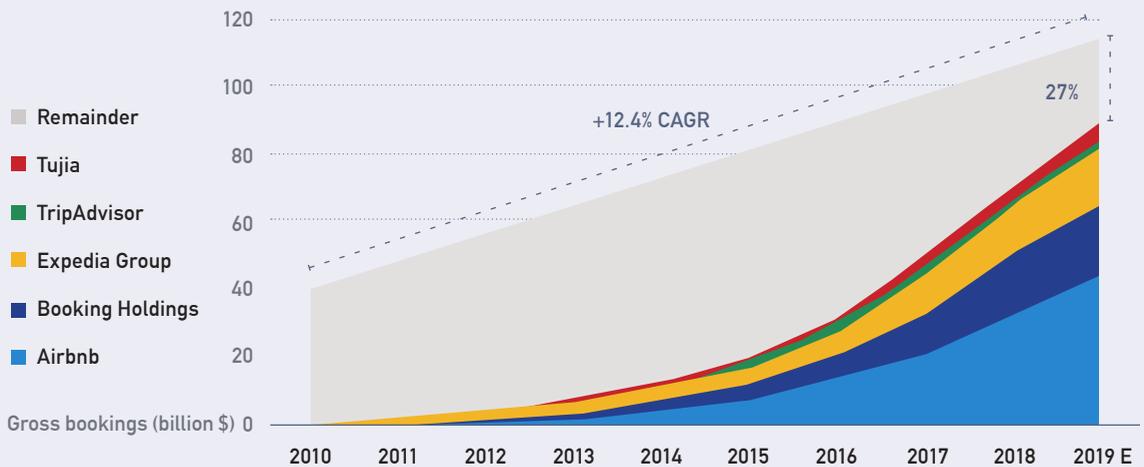
So while the regulatory spotlight focuses on urban rentals, holiday homes are becoming more attractive, and we are seeing some telling moves in this space.

Much-hyped hotel company Oyo acquired @Leisure Group in 2019 to enter the vacation rental market through full-service property management brands like Belvilla and DanCenter. Hotel company Wyndham went the other way and sold its European division of Destination Network to Platinum Equity for \$1.3 billion, before selling its U.S. vacation rental division for \$162 million to Vacasa.

Startup Vacasa has been able to scale rapidly by bringing branded home management

Short-Term Rental Bookings Through Major Platforms

Source: Skift Research



principles, with a reliance on data and brand identity, to the holiday home space. Through some major acquisitions, and while the competition is focusing predominantly on urban rentals, the company has become one of the largest property managers worldwide.

COUNTER-MOVEMENT TO COMMERCIALIZATION

While regulation remains a major uncertainty, there is little doubt that short-term rental sales will continue to grow. Expect more investment, more funding rounds, and more acquisitions. The biggest change, however, might come out of the opposite corner.

We will go out on a limb and argue that the short-term rental sector will go back to its roots. Not the entire sector, of course, but we are at a seminal moment now where some stakeholders will look at the professionalization and commercialization of the sector as a strong antithesis to its origins.

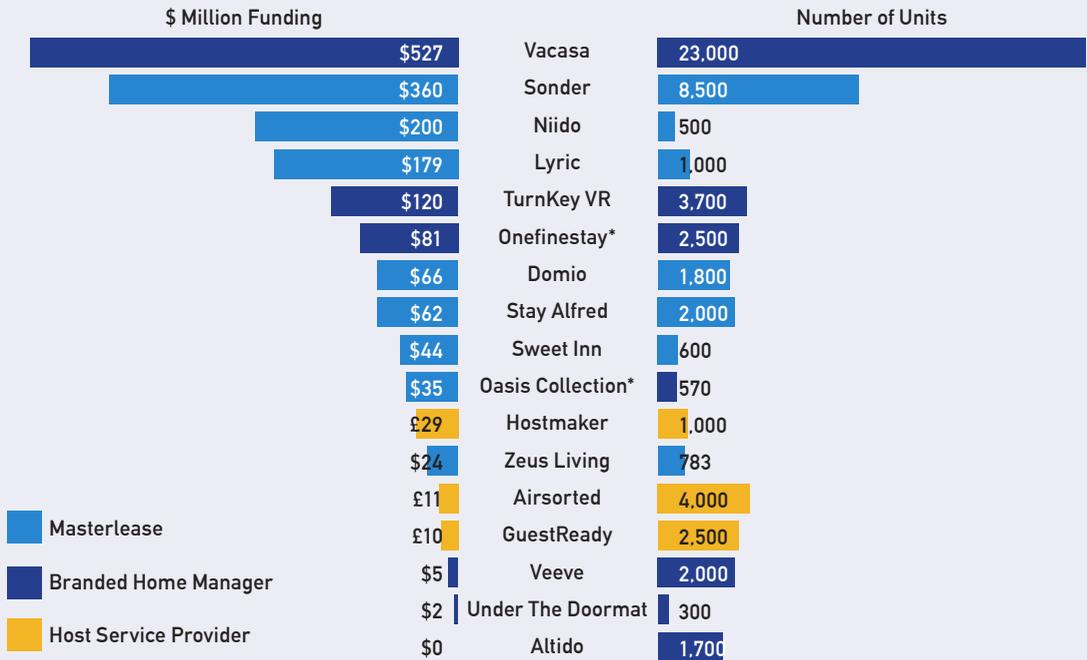
These parties will find a strong marketing ploy in offering the opposite.

As Sonder and other branded home managers professionalize the sector, offering platforms like Airbnb, Booking.com and Vrbo a convenient way to heighten standards, increase commissions, and accelerate supply growth, Airbnb will find it harder to spin its “community” agenda.

Players like Couchsurfing and BedyCasa will pick up the pieces, as there will still be a demand for true peer-to-peer stays.

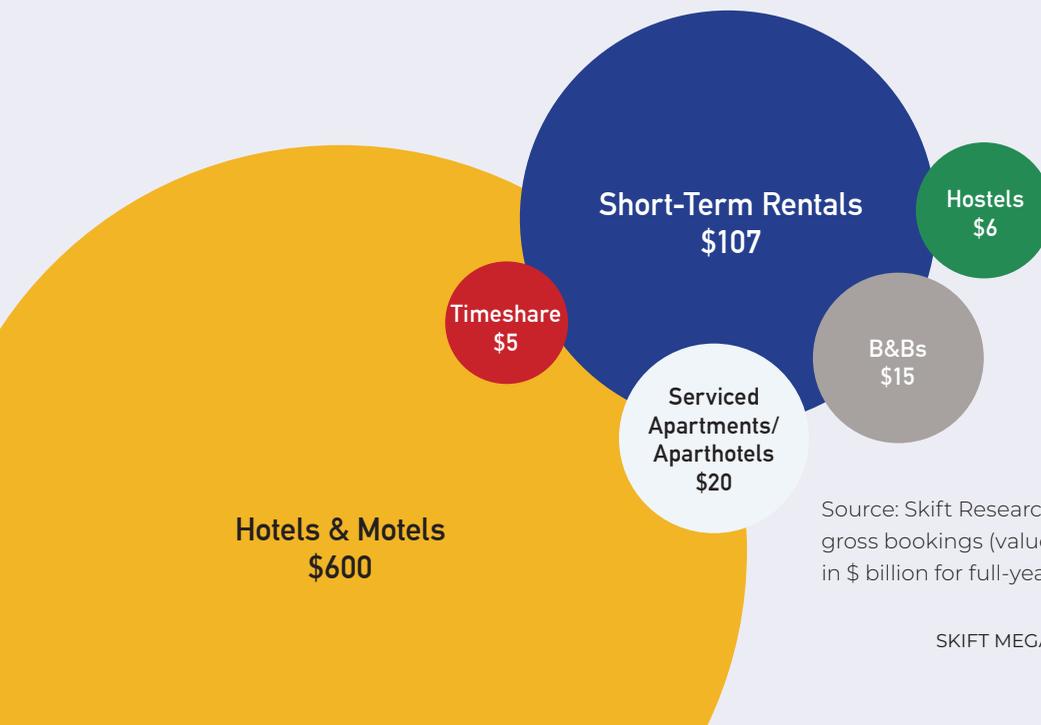
This might lead the travel industry to come up with a new categorization, looking to distinguish between professional rentals and host-run rentals. Remember, however, that for travelers the lines between hotels, short-term rentals, serviced apartments, and bed and breakfasts are already blurry. It’s not about categorization. It’s about meeting expectations, whether that is on a couch in a New York apartment, a chain hotel room, or a Sonder-branded luxury penthouse. ♦

Top Branded Property Managers

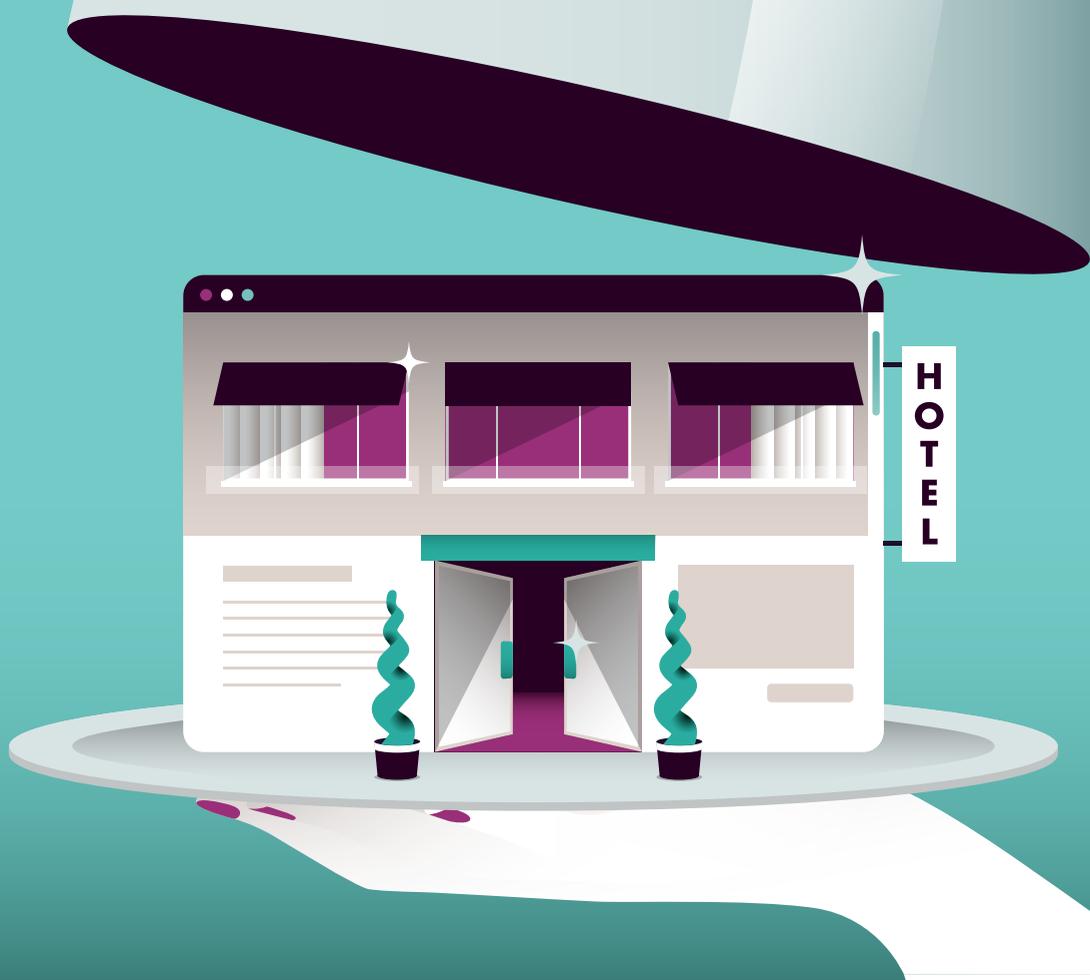


Source: Skift Research. Funding data from Crunchbase, Oct. 2019. Unit data estimates as of Oct. 2019.
 *Onefinestay funding up to April 2016, when the company was acquired by Accor for \$170 million. Oasis Collection funding up to Sept. 2018, when the company was acquired by Vacasa for an undisclosed fee.

Global Market Size (\$B) of Travel Accommodation Sectors 2018



Source: Skift Research. All values are gross bookings (value paid by customer) in \$ billion for full-year 2018.



SMART DESIGN

Is Not Just for Luxury Travel Anymore

By Raini Hamdi / Illustrations by Vanessa Branchi

Skift Take

There is no turning back on the transformation of low-budget hotels from the “uncategorized” class into a legitimate segment of the global hotel industry. Future technology and the rise of Gen Z will further fuel innovation and change in the design of economy accommodations — especially in Asia.



U pstarts across the globe led by Oyo Hotels & Homes, RedDoorz, Yanolja, and many other players are reviving faceless buildings, guesthouses, hostels, so-called love hotels, and budget vacation rentals into legitimate, respectable businesses.

The trend is being driven by tech-focused entrepreneurship and points to a deepening democratization of travel. Whether or not these ventures are profitable eventually, what they've done is reinvent the category, giving it the distribution scale to wholesalers and online travel agencies. With this ingenuity, these previously dismissed hotels are making three-star hotels look too pricey and too old.

WHAT'S SMART DESIGN FOR BUDGET?

The snowball effect is that traditional chains, such as Accor and Wyndham Hotels & Resorts, are also jumping in to redesign the budget space. In doing so, we can be sure the evolution of budget accommodations is not a flash in the pan. Accor's lowest-priced category, Ibis Budget, sports new "snug designer rooms" and the chain has fielded a modern-day hostel version in Jo&Joe. Wyndham's Super8 brand is reimagining the hostel with a new Room8 communal space that can sleep four individuals.

Smart design in budget hotels centers on the promise of clean rooms and bathrooms, communal spaces, comfortable beds with spotless linen, free Wi-Fi, safety and security, and end-to-end efficiency, from the ease of booking to payment. There is design in the aesthetic sense, although it is nowhere near the lavishness of luxury hotels.

Both Oyo and RedDoorz have a team who look at interior design and procurement of furnishings. Adding portraits of Marilyn Monroe above the twin beds at Oyo Hotel Tyler Lindale in Texas lifted occupancies by 10 percent in just seven days.

These hotel chains use a stack of proprietary technology to standardize services, amenities, and in-room experience. Oyo, for instance, has a "transformation app," Optimus, which enables its engineering and design team on the ground to assess what needs to be renovated and at what cost, as well as assign tasks and track progress, said an Oyo spokesperson. This kind of technology enables Oyo to transform and onboard properties within three to 14 days; traditional hotel companies, on the other hand, can take 10–18 months as they go back and forth with owners on a brand and property improvement plan. This accounts for why Oyo has been able to amass over 35,000 hotels in its portfolio globally to date.

Across the Asia-Pacific, there's a rash of players that have more or less a similar template, including amply funded Yanolja, a \$1 billion company famous for turning South Korea's love hotels into popular accommodations for couples, families, business travelers, and groups of friends. There are also smaller national players such as Indonesia's Airy Rooms, Thailand's Hotel Nida, and the Philippines' Go Hotels, to name just a few.

WHY ASIA IS DRIVING THE TREND

On the one hand, Asia has hundreds of thousands of super-low-priced rooms. In Indonesia alone, there are around 300,000

non-classified and 233,000 classified hotel rooms, according to Statistics Indonesia. The majority (70 percent) are three stars and below. Any wonder why Oyo and RedDoorz have made Indonesia their No. 1 focus of expansion in Southeast Asia?

RedDoorz estimates that Southeast Asia alone has over 120,000 budget hotels in the three-star or below segment as of 2018. The region's hotel market, valued at \$17 billion, is three times as big as India's. By 2023, it's expected to reach \$23 billion.

On the other hand, Asia is home to a huge population of middle-class millennials for whom travel is a lifestyle and affordability and efficiency are a given. The latest Google, Temasek, and Bain study of Southeast Asia's internet economy points out that it is budget hotels that have propelled the region's online travel growth to \$34.4 billion this year, from \$29.7 billion in 2018.

FUTURE BUDGET HOTELS

The needle, however, is shifting from millennials to Generation Z, and this will shape how budget hotels might look in the future. For the first time this year, the Gen Z population has surpassed millennials.

A Skift Research report, *Millennial and Gen Z Traveler Survey 2019: A Multi-Country Comparison Report*, shows that both politics and sustainability matter in Gen Zers' travel decisions.

Sustainability will certainly influence the future shape of budget brands, as will technology such as voice, artificial intelligence, and robotics. New budget brands have already emerged, consciously or unconsciously giving hints of what's around

the corner. Accor's Greet, which is pushing the sustainability angle through interior design, is one. The brand has partnered with homeless charity Emmaüs and recycling company Valdelia to help hotel owners source secondhand furniture or unusual decorative items.

Alibaba's FlyZoo prototype showcases the technology that the hotels of the future will deploy. Guests check in using the mobile app and use facial recognition in the elevator and at the room to open the door. Within guest rooms, voice recognition enables visitors to adjust temperature, lights, and curtains. Robots deliver water and fresh towels.

Oyo said that it's investing in signage powered by augmented reality. "These signages will enhance customer experience by routing guests to check-in counters, breakfast locations, or even the safest evacuation route during emergencies," said the Oyo spokesperson.

"Internet of things is a big area for us where we are experimenting with smart switches and smart lighting to significantly improve the guest experience."

Amit Saberwal, CEO of Singapore-based RedDoorz, said the startup chain is already trialing "the likes of self-check-in/checkout functions, smart-locking systems, and automated temperature regulation and controls."

But one thing is clear, he said. It all has to go back to creating a comfortable, hassle-free, and seamless stay for customers, Gen Zers and millennials alike, from the moment they begin searching for a room to when they arrive, stay, and check out.

Using design in the quest for this connected traveler is leveling the playing field between budget hotels and their luxury sisters. ♦

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HOW ABU DHABI IS APPROACHING MEETINGS AND EVENTS IN 2020

Skift Take

As event planners transition to experience designers, destination selection will be an asset to delivering better meetings and events in 2020. Innovation, collaboration, and sustainability are key trends; a forward-thinking destination will be an important partner for delivering on growing attendee expectations.

A clear trend defining 2020 is the transition from events to experiences. Yet according to EventMB, 67 percent of event professionals still struggle to clearly define “event experiences.”

The experience design requirement has landed on the industry with little preparation or support available. And the truth is, some events start with the handicap of poor destination selection — a vital component in the experience mix. It can be close to impossible to impress today’s attendees with a destination that does not do its part in delivering on the overall event experience.

We sat down with Ali Hassan Al Shaiba, acting executive director, tourism sector, of the Department of Culture and Tourism, Abu

Dhabi, to explore how Abu Dhabi, on track for a new launch of its meeting offering, is looking to increase the overall value of meetings and events by elevating the experience.

SkiftX: Attendees want more than flat business events; they want event experiences. What does Abu Dhabi offer to planners designing event experiences in the year 2020?

Ali Hassan Al Shaiba: Authentic local experiences combine entertainment and education. As such, we always involve a local committee in co-creating content and experiences (i.e., panel discussions, delegate hospitality experiences). For example, pearling is intertwined with Abu Dhabi’s

history and heritage, and business delegates can enjoy a pre- or post-event tour. Another is Falcon Hospital, which educates delegates on the local history and culture of falconry.

Abu Dhabi also offers visitors a chance to unwind after business events by experiencing extraordinary destinations and activities. The Empty Quarter is the largest and least explored sand desert on earth, a passage between old Arabia and the modern United Arab Emirates, and features glamping festivals with an astronomer.

SkiftX: One of the biggest event trends in 2020 is a shift toward data-driven events and decision-making. As a leader in technology, what can Abu Dhabi offer to planners trying to collect more data for improving their events and event experiences?

Al Shaiba: As data and analytics are essential to businesses achieving their ambitions, Abu Dhabi has invested significantly in data integration by developing advanced data warehousing capabilities to allow a centralized daily view from more than 80 tourism-related data sources. Moreover, we're in the process of further integrating unstructured marketing data sets to inform strategies that engage visitors in Abu Dhabi's authentic experience journey.

SkiftX: Sustainability is probably the single most important issue of our generation. What makes Abu Dhabi a global leader for sustainability in events?

Al Shaiba: Sustainability is an important global issue and Abu Dhabi supports planners

in creating sustainable events. Delegates are increasingly looking to contribute — from planting trees to offsetting their carbon footprint to raising funds for local charities through an auction.

Masdar City is one of the world's most sustainable urban communities. This low-carbon development is made up of a rapidly growing clean-tech cluster. It is the perfect venue for sustainable events.

Also, in April 2019, our national carrier, Etihad Airways, became the first airline in the world to operate an ultra-long-haul flight without single-use plastics. In an aim to be more sustainable, Etihad Airways will reduce its consumption of single-use plastics by 80 percent by the end of 2022.

SkiftX: The United Arab Emirates is famed for some pretty impressive architectural feats. How has this impacted events, and what does Abu Dhabi's modern architecture offer planners looking to create event experiences in unique venues? >>



Ali Hassan Al Shaiba ►

Acting Executive Director, Tourism Sector,
Department of Culture and Tourism, Abu Dhabi

Al Shaiba: Abu Dhabi is home to some of the most beautifully designed venues, including the Louvre Abu Dhabi, Sheikh Zayed Grand Mosque, and the award-winning, state-of-the-art exhibition center, Abu Dhabi National Exhibition Centre (ADNEC), which hosts more than 327 events per year and welcomes over 1.6 million visitors to the venue. We have witnessed an increase in interest from guests, including business tourists, to visit these landmarks, which leave visitors in awe due to their appealing architecture.

Future architectural developments also receive our input to ensure they are flexible enough to accommodate different event needs. These projects are also equipped with technology to enhance the delegate experience, which is a value-add to organizers looking to curate a more immersive experience.

SkiftX: Planners venturing into new territory often have to orchestrate events while getting used to a whole new support network. How is Abu Dhabi preparing for incoming international business and supporting planners who are in—or coming to—the region?

Al Shaiba: The Convention Bureau connects organizers with local communities such as startups, academia, corporate meeting planners, and conference organizers to explore content co-creation and enable knowledge sharing and transfer for various projects. We also encourage event organizers to leverage technology to enable ease of networking. Our financial grant toward business events qualifies such expenses.

**AS A
PARTNER, WE
UNDERSTAND
THAT AN EVENT
IS FAR BIGGER
THAN THE
“SHOW DAY.”**

The bureau takes a “team Abu Dhabi” approach, acting as a one-stop shop for event organizers. Along with destination information like hotel room inventory, venue specifications, etc., we provide information on each industry sector to give organizers — especially new entrants — a quick overview of the destination and our economic drivers. This allows them to focus on themes and content verticals that differentiate their events. We also contribute to feasibility studies before they decide to launch any event and strategically market the event locally and internationally to drive awareness and build attendance. As a partner, we understand that an event is often far bigger than the “show day.” Events are an opportunity to communicate with attendees long before and long after the event has taken place. ♦

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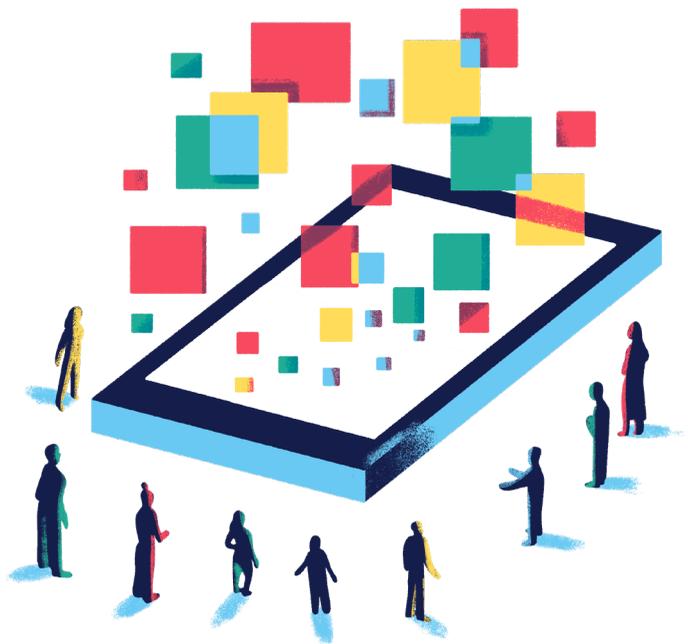
FOR EVENTS

By Isaac Carey and Julius Solaris

Illustrations by Amanda Berglund

Skift Take

All-in-one software doesn't just simplify the event planning process. It transforms the way planners track and learn from events. How these all-in-one tools evolve is starting to shape the future of the meetings industry.



 In a fundamental level, the main role of event planners is to simply throw fantastic events. For decades, this has attracted people with strong management skills, often with experience in hospitality or entertainment. An affinity for tech and data, however, was never a key part of the job.

Things are starting to change—and planners know this. Digital technology has grown rapidly in the past few years, and along with it, the ability to collect important data. Over

75 percent of job postings for high-profile roles in meeting planning now require skills in performance and data analysis, according to a recent EventMB study.

It's no wonder, then, that all-in-one event management software is rapidly becoming more common. Rather than juggling several tools for planning events, meeting professionals increasingly favor the use of one single tool that can handle the entire process of event planning—from beginning to end.

ADVANCED DATA TOOLS WILL QUICKLY BECOME A NECESSITY.

Not only does this simplify the process, it also allows for a much more sophisticated way of collecting and analyzing data. With an all-in-one tool, data is funneled in from a multitude of different sources and pooled in one place. This gives planners all the pieces of the puzzle, allowing for a fuller, more holistic picture of an event.

OVERDUE FOR DISRUPTION

The problem is, implementation of this kind of platform currently doesn't deliver on what brands promise. Data is still scattered across a variety of different tools, and combining those tools is a wildly complex task. Right now, companies are scrambling to make this platform a seamless experience, and the industry is on the brink of a massive change.

Some companies, such as Cvent, have approached this problem through acquisitions. Cvent is perhaps the biggest spender in this arena, buying up tech startups to add to its ever-growing collection of event tools. Most recently, the company acquired Double Dutch in June, an event app startup.

Many, however, have criticized Cvent for having a disjointed and overly complicated platform. By acquiring so many different businesses, with different user experiences and different leadership, it can sometimes feel like an odd jumble of tools rather than one seamless platform.

The company is also investing in building its own event features, but it plans to keep the acquisitions coming, according to Cvent CEO Reggie Aggarwal. "Technology has been

changing the face of corporate meetings and events for more than two decades," said Aggarwal. "Cvent aims to stay ahead of the curve on this by looking for startups that not only meet but also anticipate the growing needs of event planners. Companies like Kapow and Social Tables have all been ahead of their time, which is why we see them as important components of our platform."

Integration is tough, however. Not only can acquisitions lead to a disjointed, complicated platform, but it can pose real risks to the company itself. Eventbrite acquired Ticketfly in 2017, and one year later, millions of Ticketfly accounts were hacked. Moreover, Eventbrite was so slow to integrate Ticketfly that it caused Eventbrite shares to plunge in March.

This is why some companies prefer to build their tool offerings, hoping to develop that elusive all-in-one platform through their own research and development. And investors are paying attention: The recent wave of event tech funding is proof that the industry knows where the future lies.

"We're always out there looking for new acquisitions, especially in emerging technology," said David Quattrone, co-founder and chief technology officer at Cvent.

In fact, the unprecedented wave of event tech funding is helping companies with one or two very specific tools transition to more comprehensive platforms without having to make acquisitions. Event startup Fever, for example, raised \$35 million in August, which CEO Ignacio Bachiller said would go toward research and development. >>

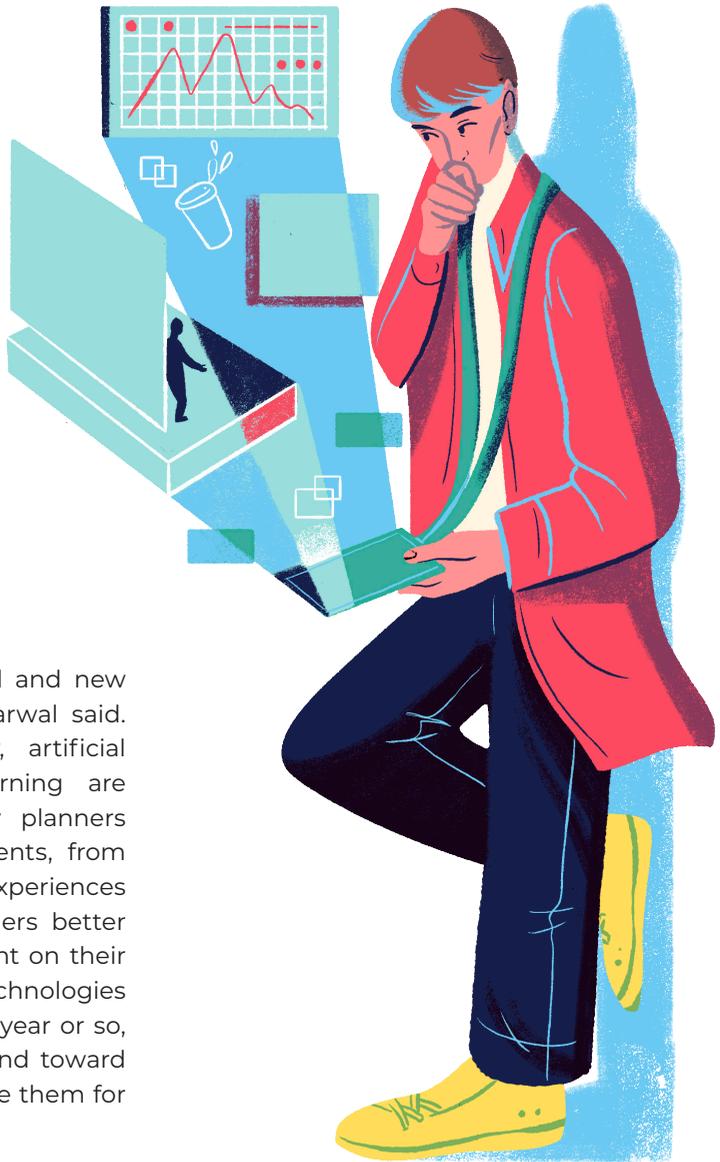
TECH IS CONSTANTLY EVOLVING

Data is a religion that both planners and providers need to convert to — but one that has grown very fast over the past year and will define 2020. Key players in the industry predict that event tech will explode over the next few years, suggesting that advanced data tools will quickly become a necessity, rather than something optional.

“We’re still in the early adopter phase,” said Mike Burns, chief revenue officer at Aventri, an event technology platform. “But in the next five years I think it’s going to explode. It’s going to be a tremendous take rate. I think it’ll become less of a conscious decision for planners, and just something that’s a given. It will just get incorporated into what people now do to measure their sales and marketing.”

On top of that, technology is constantly evolving, and smart event tech companies are always looking into the next emerging thing.

“There are still big trends ahead and new horizons to reach,” Cvent’s Aggarwal said. “Artificial reality, virtual reality, artificial intelligence, and machine learning are all poised to change the way planners and attendees interact with events, from creating more tactile, engaging experiences to helping marketers and planners better measure the return on investment on their events. We expect to see these technologies continue to evolve over the next year or so, and will be keeping an open mind toward how we might be able to leverage them for better client outcomes.” ♦





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THE RISE OF ULTRA-LONG-HAUL FLIGHTS IS CHANGING THE WAY WE TRAVEL

By Brian Sumers / Illustrations by Min Liu

Skift Take

Connecting to the ends of the Earth with nonstop flights is an increasingly attractive prospect for flyers. The growing popularity of nearly day-long flights, however, is set to disrupt the economics of the airline business. Adapting will be crucial as demand from the travel industry grows.

Qantas in October 2019 scored a coup with its first-ever direct flight from New York to Sydney, a record 20 hours of nonstop travel. The ultra-long-haul flight garnered plenty of headlines, but more meaningful is that it underscored a trend that will change flying in the years to come.

Airlines for decades often sought to fly the biggest aircraft they could on routes between the largest cities, pushing passengers through megahubs in New York, Frankfurt, London, Tokyo, or Dubai, where they could switch to a smaller airplane to

take them to Nashville, Osaka, or Nairobi. Two new aircraft, the Boeing 787 — the one on the Qantas flight — and Airbus A350, however, have changed the model, and in the coming decades, more passengers will be able to fly nonstop to more places than ever on ultra-long-haul flights.

This is excellent news for many airlines, which can fly to new markets that never would have worked with previous-generation airplanes. In most cases, the larger airplanes had the range, but the economics stunk. All of them burned too much fuel or carried too many passengers to make niche routes viable.



It is, however, less auspicious for airlines that still rely on massive megahubs, including the big three in the Gulf — Emirates, Etihad Airways, and Qatar Airways. Since they represent countries with few local travelers, the trio has thrived by connecting passengers between cities, through their hubs. They may struggle as more airlines test new long-haul routes between cities that could never support them in the past.

Already, we are seeing signs that this trend is changing how people travel. Worldwide, airlines are using the newest twin-engine technology to remake where they fly. On the 787, customers already can fly nonstop from London to Nashville, Newark to Cape Town, Boston to Tokyo, Santiago, Chile, to Melbourne, and Warsaw to Ho Chi Minh City. Airlines will use the airplane for more growth in 2020, with Air New Zealand adding New York to Auckland and American Airlines starting Los Angeles to Christchurch.

“We’re flying to places people haven’t gone to before,” Vasu Raja, American Airlines’ senior vice president for network, said last year before announcing the Christchurch

route. “With the new shiny 787, we want to continue that. That’s the airplane that’s going to take us eventually to India and to Africa and markets which are very different than the ones that we’ve been in historically.”

This trend is just beginning. Within the next decade, airlines will use these airplanes to push aviation’s final frontiers. In some cases, they will fly farther than ever, like the Qantas flight. In many others, they will add a nonstop flight where none had been viable. Conceivably, travelers in all types of markets could be winners. Passengers in smaller markets, like Denver, New Orleans, Berlin, or Osaka, should see more nonstop connections with major cities, while travelers in big markets will increasingly see more flights to secondary or tertiary markets, like Cape Town, South Africa.

“The 20-hour flights will get the headlines and serve as marketing and PR tools for airlines,” said Madhu Unnikrishnan, editor of Skift Airline Weekly. “But the real power behind this movement is the 10- or 12–13-hour flights between two cities that can’t be profitably served by a larger aircraft.” >>

THIS IS REAL

Over the past two decades, manufacturers and some airlines made other predictions about future trends. European manufacturer Airbus bet on giant aircraft, promoting the A380 as solution to the capacity crunch at some connecting hubs, including London, Hong Kong, and Dubai.

Some bought the hype, but it never was backed by evidence. Airbus has delivered roughly 240 A380s in more than a decade, nearly half to Emirates. No airline in the Americas wanted it, and although several European carriers have small fleets, many chose it more for continental pride than economics. Airbus soon will stop building them, and some airlines, including Air France, will retire them early.

Airlines actually want the 787 and A350. Airlines and lessors have placed orders for 1,450 Boeing 787s, with about 900 deliveries so far, while Airbus has filled about a third of 900 orders for the A350. Demand is strong, and most airlines will use these airplanes as they were intended, to fly nine or more hours, often on new routes.

And for good reason, as both airplanes have two major advantages over the A380. One is cost, since both rely on the newest technology to reduce fuel burn. But size is important too.

Not every route will work. Some airlines have pulled back from aggressive moves: United, which discovered the secondary Chinese cities of Xi'An and Hangzhou weren't ready for nonstop transpacific service from a U.S. carrier. But Skift Airline Weekly's Unnikrishnan said there will be more winners

than losers as airlines choose new markets for their newest assets. That includes 787 or A350 flights to Europe and North America from secondary Chinese cities, though Chinese carriers may have an edge.

"If there is sufficient demand," he said, "these routes are now possible, and this is what the passenger will want to fly."

WINNERS AND LOSERS

Most airlines should benefit from this new trend, since they can access new markets that could produce higher margins. Big airlines like United can experiment with unusual routes, while smaller ones like Kenya Airways finally have a tool to fly to New York with reasonable economics.

But a few have a lot to lose.

Most airlines at high risk are located in the Gulf. Over the past two decades, Emirates, Etihad, and Qatar built megahubs that can efficiently connect passengers between just about any two points. Bit by bit, however, competitors are chipping away at what makes those hubs so valuable.

If United's customers can fly nonstop from San Francisco to Delhi, many will no longer want to stop in Doha or Dubai, even if the Gulf airline passenger experience is slightly better. Customers in other regions are making the same calculation. Why should a passenger in Nairobi connect in Doha when Kenya Airways has a nonstop?

Good question. And the answer seems obvious. Airlines are already starting to accommodate. ♦

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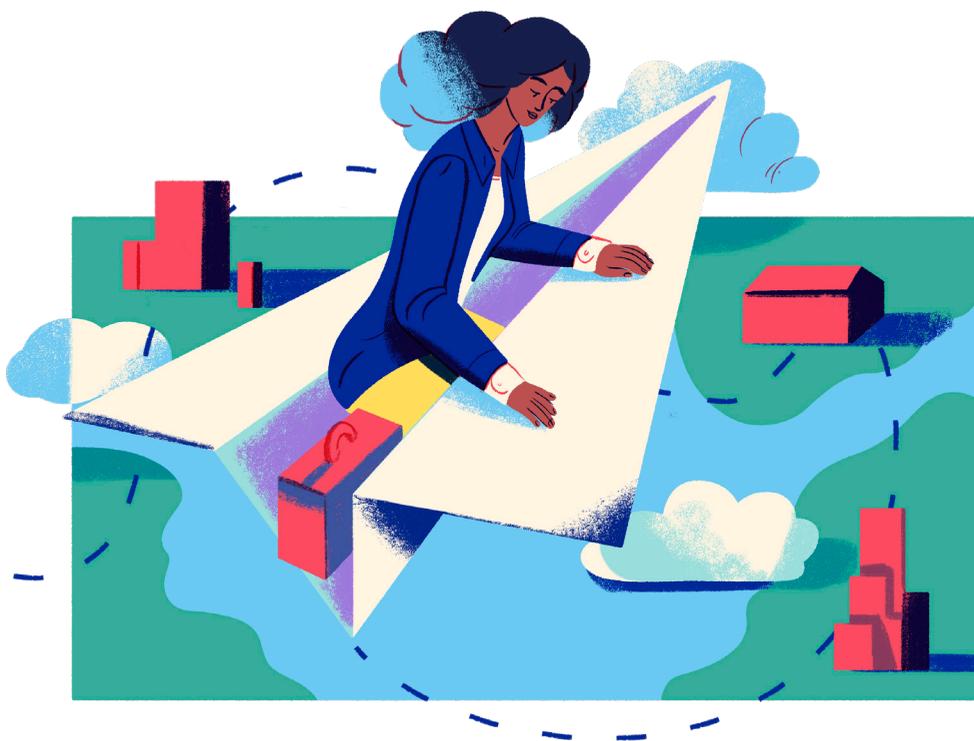
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TECH'S POWER GRAB FOR CORPORATE TRAVEL



By **Andrew Sheivachman** / Illustrations by Amanda Berglund

Skift Take

Slick new startups have been putting pressure on corporate travel incumbents. This portends a bright future for the average business traveler and travel technology investors alike.



Corporate travel for years was the most boring sector in all of travel. A handful of giant companies with similar products had control of the market, leading to a stagnant experience for travelers that rarely changed even as travel technology became more sophisticated.

A wave of startups offering travel management services, though, are revitalizing the sector by pulling from the big tech, software-as-a-service model that has helped bring a focus on the traveler back to business travel.

By bringing the big tech sensibility and creative engineering to corporate travel, these companies have forced incumbent powers to bill themselves as technology platforms instead of focusing on service delivery alone. The future of corporate travel will become simpler for both travelers and administrators as a result of this shift, ushering in a new era.

Tech investors, with good reason, are now paying major attention to business travel. Mobile-first software-as-a-service has serious ramifications for business travel. Service via mobile chat and smart automation is putting an end to pricey phone calls to human agents while the booking process has been streamlined for business travelers and brought closer to the consumer experience.

Corporate travel platforms were designed for travel managers and administrators, not actual travelers. Big companies have labyrinthian corporate processes that business travel management must fit into; the easier life becomes for stakeholders, it went, the more likely a company buys into your travel management ecosystem. These

companies earn billions each year from service fees garnered when a traveler interacts with a human agent and commissions from flight or hotel sales, giving them little reason to innovate on their own.

Rogue bookings made outside a travel management platform were often seen as the sector's biggest challenge instead of the lackluster user interface and service delivery that astounds frequent business travelers.

Most of the innovation is now centered around serving small and medium-size businesses. Growing companies had few services geared toward them because they travel much less than a global corporation. Services like Concur are geared to the needs of these bigger companies, leaving a gap in the market for new entrants to explore.

END OF AN ERA

A funny thing has happened, though; the same platforms geared to smaller businesses are catching the attention of bigger companies. A more nimble technology platform means features and integrations can be deployed at a faster clip while the user interface is more similar to a traditional online travel agency than a relic of the MySpace era.

These startups made the early realization that the end-user of travel management software is not just a company's accounting office, but the actual traveler on the road for their employer. Happier travelers create more productive business outcomes and create a stickiness for the travel management company when it's time to re-sign a client. >>

Human service is no longer a differentiator; simple mobile interfaces and smart tools for administrators have become vital to competition. These startups are also competing favorably on the distribution front, building partnerships with airlines and offering a variety of options for travelers.

Technology investors are now paying major attention. TripActions has raised upward of \$481 million, leading the company to bill itself as a unicorn even if it's unclear whether the startup would thrive as a public company. European rival Travelperk has raised over \$133 million to fund its growth.

"A lot of people tried to disrupt the major travel management companies, and they always failed," Ariel Cohen, CEO of TripActions, told Skift when the company announced it would expand across the world. "We had this vision to be an upstart that is always going for it and creating an end-to-end business travel solution that includes the globe ... We are adding 25 agents every month globally, we want to make sure we are getting a bigger type of customer that we are able to service no matter where they are."

The irony is that these technology companies are beholden to a traditional sales process to land valuable new clients. Running a sales and marketing operation to push explosive global growth doesn't come cheap; it's understandable that investors are looking to buy into these companies as they burn cash to dominate the fragmented market for business travel services.

BACK TO THE FUTURE

It hasn't been surprising to see established players in corporate travel partner with some of these startups to break into a market they long ignored.

American Express Global Business Travel, the largest travel management company in the world, bought into Kayak co-founder Paul English's Lola, which will use the legacy company's huge sales force to bring in more clients. Flight Centre is also involved with Priceline co-founder Jay Walker's Upside, hoping to leverage its back-end technology in talks with potential customers.

The big dogs have been forced to revamp their technology infrastructures in due course. They've also changed their branding, in many cases; Carlson Wagonlit Travel is now a "business-to-business-to-consumer" company, for instance.

New competition has compelled the top companies in the space to not just keep pace with the wave of innovation hitting the sector but invest for the future. The leaders at these incumbents are licking their chops with eyes slowly morphing into dollar signs. If TripActions claims to be a unicorn, how much is a company like American Express Global Business Travel or BCD Travel potentially worth to private equity groups or public investors?

A sector known for irrelevance now has a stake in not only improving its technology but also the outcome for the travelers it serves. With business travel changing for the better, everyone wins. ♦

Google Takes Charge

By Dennis Schaal

Skift Take

Google has some innovative products that enable the company to collect unimaginable quantities of personal data. That is making it all that much easier to suck the life out of travel competitors.



Make no mistake about it: Google is taking charge. The Google factor is reverberating throughout the travel industry as big players like Expedia Group and TripAdvisor see their market caps lopped while smaller companies struggle to surface a free link for potential customers that appears higher than in page-five purgatory.

Google has large enterprises, like Android and YouTube, and nascent forays, such as Sidewalk Labs' efforts to develop smart cities. It also has its own travel businesses in flights, hotels, vacation rentals, vacation packages, destination guides, maps, and soon, no doubt, tours and activities.

Google enters 2020 with more or less one-stop shop travel pages with all of these services available. It's also jamming them into Google Maps, which is well on its way to becoming a superapp for travel, local services, navigation, transit directions, and more. Recent Google Maps tweaks include giving users the ability to see all of their flight and hotel reservations simultaneously, hotel bookings, dining reservations, and a feature where commuters in 30 countries can view rideshare and bike options to begin or continue their journeys to or from bus or rail stations.

Yet Google is making no signs toward becoming an online travel agency, as its advertising business is still its main priority. Google is indeed handling more bookings on behalf of travel partners in a bid to get consumers accustomed to looking to Google for all their travel and transportation needs.

Along with its grip on search in most parts of the world, with the exception of China where

it can't climb the Great Firewall, Google uses its tremendous resources, technology prowess, and vast troves of personal data to hone its travel products. Google claims it's not selling this personal data to advertisers, but Google is indeed leveraging that data to present travelers with inventory and offers that will make them much more likely to click toward advertisers' offers or book on Google. So Google, like Facebook, makes a ton of money off users' personal information.

DOMINANCE THROUGH DATA COLLECTION

Consider the kinds of information about travelers that Google has access to. If travelers are Gmail users, Google mines their emails and collects virtually all of their travel itineraries, including favorite airlines and airport, departure times, and preferred seat types. Google knows which YouTube videos you watch and which Android apps you download. It knows what is on your Google Calendar.

Then there is the awe-inspiring computing power at Google's disposal across its verticals, including travel. Built on the foundations of Google's investments in artificial intelligence, Alphabet CEO Sundar Pichai told analysts that BERT, a new type of "neural network-based technique for natural language processing," parses subtle patterns in users' queries and is "the biggest leap forward in the past five years." BERT stands for Bidirectional Encoder Representations from Transformers.



But more than a mouthful, making answers to travelers' questions more precise and relevant than any competitor can hope to is an enormous, if seemingly invisible, competitive advantage.

Pichai likewise boasted that when it comes to quantum computing, Google's Sycamore "machine" can perform some calculations faster than supercomputers.

Together, between BERT and Sycamore, that's a lot of firepower for Google search which, according to then-Expedia Group

CEO Mark Okerstrom in November, was increasingly extracting more travel revenue per Google visitor. Google is also, he said, diverting more travelers looking for flights and hotels from formerly free search results toward its own travel advertising businesses.

Okerstrom said during an Expedia Group earnings call with analysts that Google will inevitably continue to experiment with new products such as BERT.

That same month, Expedia Group, TripAdvisor, and, to a lesser extent, Booking

Holdings have acknowledged the Google factor was hurting their businesses.

Google contributed to a weak third-quarter financial performance at Expedia, which was forced to shift from organic links and lower-cost marketing channels like Google Search into higher-cost marketing forums such as Google Hotels. TripAdvisor likewise reeled. Both saw their market caps pummeled. TripAdvisor stated, "We believe our most significant challenge remains Google pushing its own hotel products in search results."

REGULATORY BACKLASH?

A TripAdvisor spokesperson told Skift that Google's adverse impact is global, except for China, where Google is shut out. "It's not specific to any one country," the spokesperson said. TripAdvisor, Yelp, and a plethora of other companies, including travel startups, have been complaining for years about Google exerting its search engine grip to compete unfairly to the benefit of its own businesses. Google has been subject to a series of fines related to its anticompetitive business practices in Europe, although so far it has escaped a focus on its travel businesses, in particular. Still, Margrethe Vestager, the European commissioner for competition, said in November that a plan to level the playing field between Google and its retail competitors has so far not really worked.

A backlash against Big Tech, which to some extent has bipartisan support in the United States, has led virtually every state attorney general to join an effort to investigate Google's — and separately, Facebook's —

business practices. A U.S. federal probe of Google is newly under way.

Barring a regulatory sledgehammer, Google will increasingly take charge, extract higher advertising spend from businesses that have few options to get heard, and relentlessly win market share. In the creep, creep, creep of its travel portfolio getting more comprehensive, Google in 2019 unveiled its own vacation rental product, adding to its travel portfolio of flights, hotels, and vacation packages. As one indicator of Google's power, late last year, Airbnb was participating in Google's vacation rentals product in Europe as a test of whether it wants in or out.

TRIPADVISOR AND YELP HAVE BEEN COMPLAINING FOR YEARS ABOUT GOOGLE.

Expect more to come. Google shut down Touring Bird, the tours and activities comparison business that it had been incubating, but it's only a matter of time before these experiences make their way into Google Maps and Google's travel pages. As published reports indicate, Google will be handling some of the bookings too. ♦

Megatrends 2020

By Julius Solaris

EventMB is your resource for trends, technology, innovation, and education in the events industry. Get more insight into the Megatrends shaping the future of events in 2020 at eventmanagerblog.com/10-event-trends.

01 Flight Shaming Calls for Virtual Meetings

A stronger commitment to sustainability will result in a reduction in unnecessary travel, especially for non-transactional event attendance, in favor of online delivery methods. Creating virtual attendee experiences that merit the ticket price will require new technological tools: 360-degree video, virtual networking rooms, and enhanced commenting and collaboration.

02 One Software for All Meetings

A strong wave of event tech acquisitions is making end-to-end solutions better. Usage of all-in-one platforms has grown 27 percent year-over-year, replacing the traditional tech stack composed of a range of functionally differentiated tools from different suppliers. All-in-one software, moreover, offers enough data points for non-tech-savvy planners to make educated decisions about their event return on investment.

03 Experiential Design Trumps Planning

With 40 percent to 70 percent more budget from marketing departments in 2019, expectations for events are rising. Traditionally business-driven events have evolved to incorporate diet, wellness, and better pacing into standard value-driven conference talks. The transition to experiences is pushing planners to become more strategic and find ways of delivering on the participants' objectives in a more cohesive, interactive way.

04 Row, Row, Row Your Boat or Train or Plane

Immersive environments are proving a valuable tool for delivering transformative experiences, and the demand for memorable, unconventional venues is on the rise. Choosing the means of transportation as the actual event venue in and of itself offers an interesting experiential twist — and creates a space where even the most distracted attendees can start engaging.

05 Hollywoodification of Events

Planners will take a page from Hollywood's playbook and sit in the director's seat to achieve true engagement through storytelling. Event programming will involve more interactivity and novelty for better brain stimulation, and attendees will take a more active role in shaping the event narrative. Audio-visual (AV) technology, projection mapping, virtual reality (VR), and augmented reality (AR) via event apps will help planners execute their immersive visions.

07 Beyond Recycling

For an event to be called sustainable in 2020, the bar will be set much higher. It's not just a trend, it's an expectation. In response to growing environmental urgency, some planners are pushing beyond the basics with recyclable or digital signage, water stations, recyclable silverware, and tree planting activities during the event. Brands are also taking notice: Alternatives such as Falconboard and Xanita provide recyclable exhibition booths that look incredible and do not impact the environment.

09 Networking: Hello, Stranger!

We attend business events for curated opportunities to find new peers and partners, but networking is the most neglected element in most events. Event activities and technology will need to improve; including a networking lounge is no longer enough. This year will also mark a shift toward inclusivity and accommodating younger, non-drinking, introverted, disabled, and underrepresented audiences.

06 Micro-Mapping

Micro-mapping adds an interactive dimension to projection mapping, allowing planners to turn any surface into a touch screen. Event attendees change elements of the projection by interacting with them. For example, if an exhibitor listing were projected onto a wall at the entrance of a trade show, micro-mapping could allow attendees to retrieve company information by tapping on an exhibitor's name. All projected on a surface, no mobile device.

08 More Collaboration, Less Presentation

Despite widespread complaints about the lack of engagement in presentations and panel discussions, death by Powerpoint is still a prevalent occurrence in events. The year 2020 will see a tremendous science-backed shift toward attendee-to-attendee collaboration. Technology will naturally play a major role in expanding collaborative opportunities beyond analog group interactions, as it facilitates forming connections in large groups and organizes content in a digestible way.

10 A New Day: The Rise of the Event Strategist

The year 2020 will see the beginning of more modern, data-driven events and a transition from mere list execution to a more data-centric approach to planning and executing transformative experiences. The event strategists who emerge will be extremely fluent in data analysis, using it to inform growth, evolve traditional event formats, and prove return on investment to all stakeholders.

Skift. RESEARCH

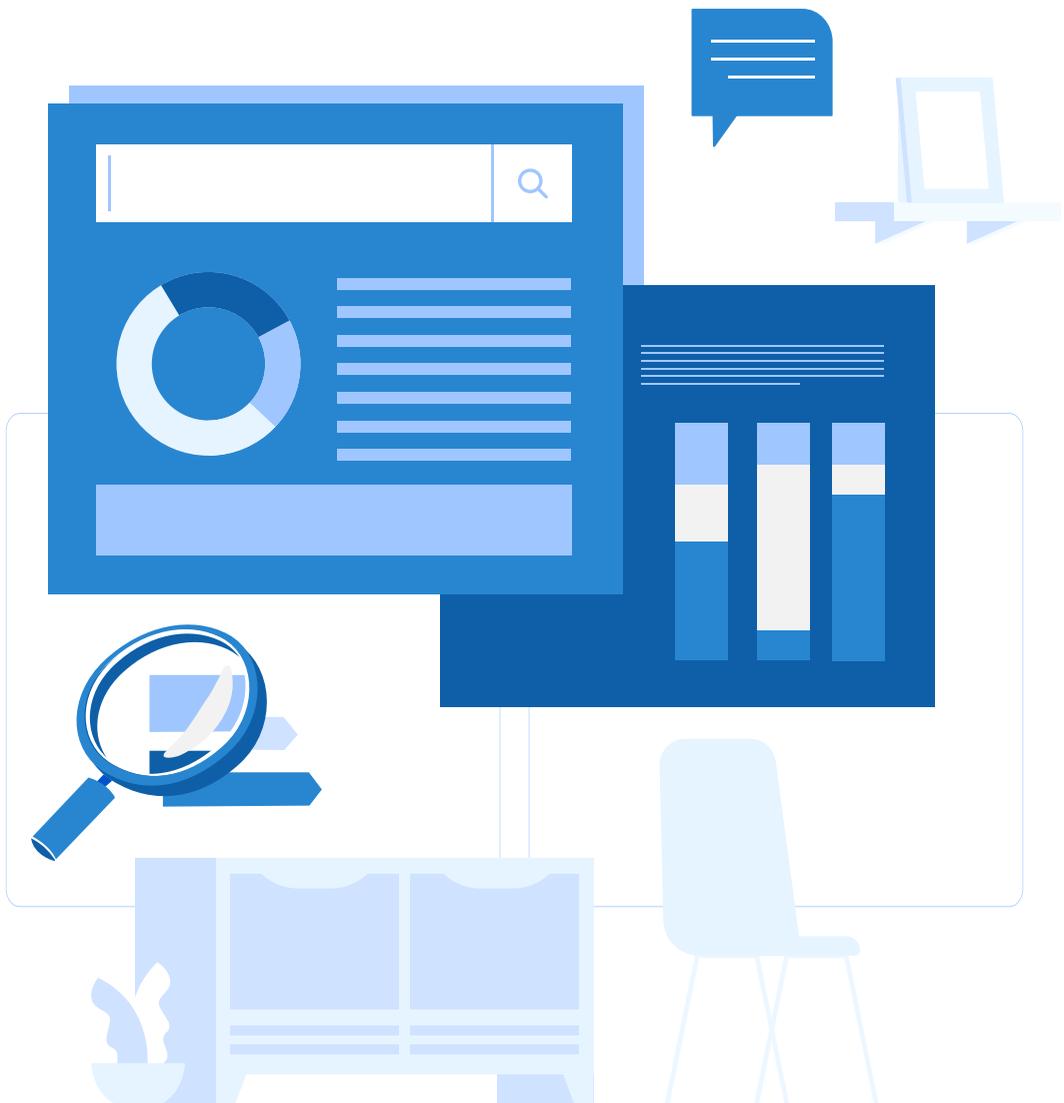
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joie de vivre
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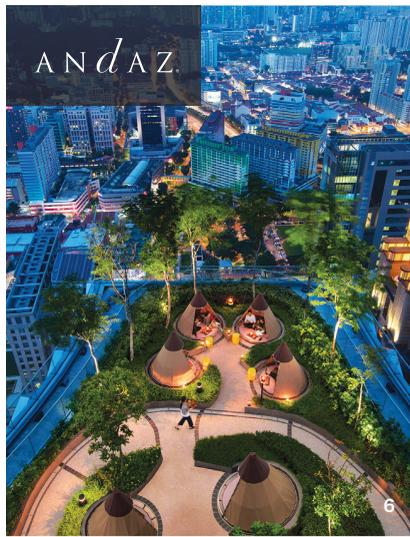


THOMPSON
HOTELS



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ANDAZ



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exhale



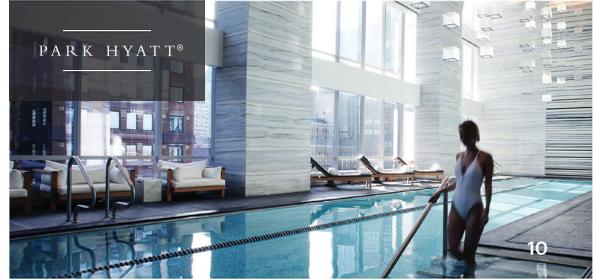
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THE ORBOND COLLECTION
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16

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