

# CATALYSTS FOR CHANGE:

Building the Hospitality  
Ecosystem of the Future



## Foreword

By Francisco Pérez-Lozao Rüter, President, Hospitality, Amadeus

At Amadeus, we are taking an ecosystem approach as we build the future of hospitality.

By acknowledging interdependence and connection with others, humans and businesses can come up with surprising solutions. This is certainly true of the travel technology sector – where greater collaboration can lead to exponential rewards.

Denser and richer networks of connection, the blurring of boundaries and increasing interconnection are central to creating value that could not have been achieved alone.

For Amadeus, this means linking the hotel, mobility, and travel protection verticals into an ecosystem – one better able to meet the overlapping needs of travelers, travel sellers, and travel providers.

The industry is constantly shifting, moving, and fluctuating – probably more so now than ever before. By becoming more creative, more sustainable, and being more resilient Amadeus is working to create a new vision for our industry.

This ecosystem approach marks a step change for the travel industry, a sector that until now has been extremely fragmented. While many have seen division as a block to progress, we see an opportunity to blur boundaries and unite exceptional talent and capabilities from inside and outside of the industry.

By working together with partners from across the ecosystem, we are proud to have collectively developed and deployed technology-driven solutions to meet the most pressing challenges.

As this work continues, we hope this paper helps to shed light on the changing expectations of travelers, illustrating how an ecosystem-led approach can help stakeholders respond to create better journeys for all.

# Introduction

Data paints a positive picture for the year ahead in the global hospitality market.

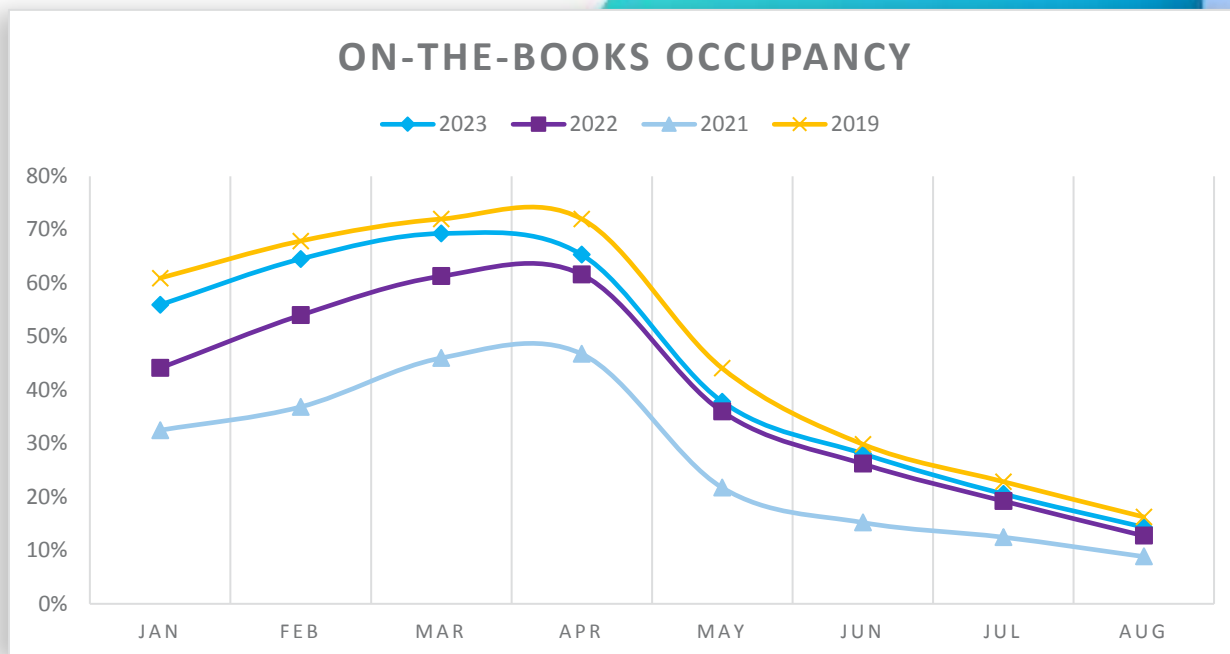
Business travelers are returning to the road and booking hotels, while the leisure sector can anticipate a strong season as holidaymakers take restriction-free breaks.

With global travel now firmly on the rise, there is a growing belief the industry can be a force for economic good – as well as breaking down barriers and powering progress by connecting people and cultures.

The trend is illustrated by Demand360® data from Amadeus.

On-the-books global hotel occupancy achieved 63% for Q1 2023 this year – closing in on the figure of 67% seen for the same period in 2019 and ahead of the 38% and 53% seen for Q1 2021 and 2022 respectively.

The trend is mirrored throughout the rest of 2023, with bookings close to 2019 levels and ahead of those recorded in 2021 and 2022.

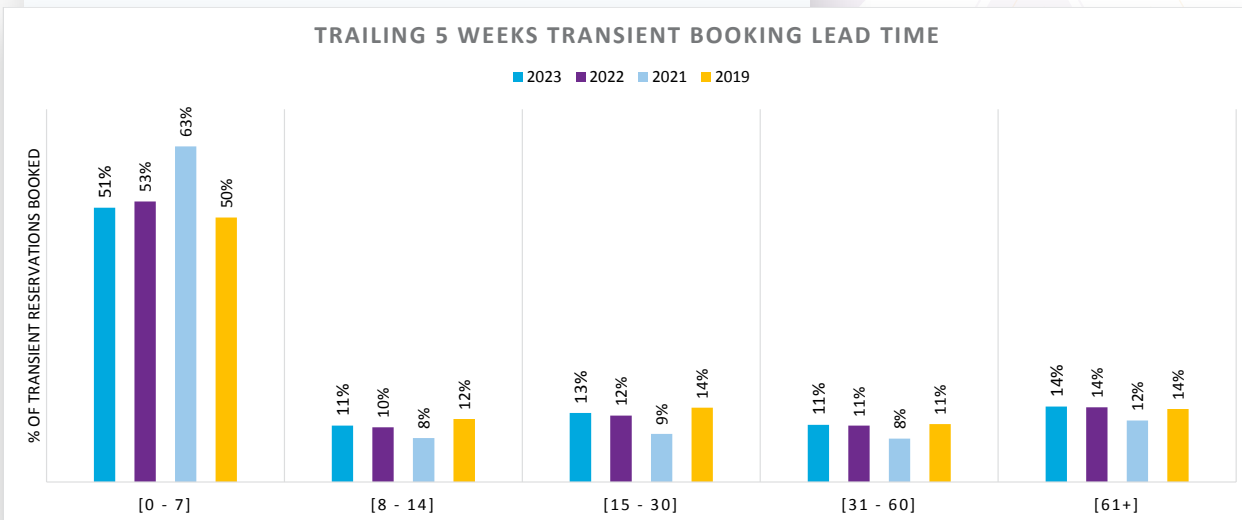


Source: Amadeus Demand360® data as of April 22, 2023

As most people in the industry will know, hotel booking windows shortened dramatically during the pandemic, as travelers waited until the last moment to make plans.

In 2021, 64% of hotel reservations were made within zero-to-seven days of travel, according to Amadeus data. This, too, is reverting to pre-pandemic levels, with 51% of reservations so far this year being made a week before travel, close to the 50% average seen in 2019.

Travel confidence is also on the rise in 2023, demonstrated by the 14% of hotel reservations booked 61+ days out, matching 2019 figures.



Source: Amadeus Demand360® data as of April 22, 2023

Yet, it is important to acknowledge things have changed – the hospitality market of 2023 is not that of 2019. The COVID-19 pandemic will continue to reverberate, reshaping the industry in ways it would have been impossible to predict just three years ago.

Today, hoteliers are seeing evolving traveler expectations around personalized and sustainable experiences, while they must also focus on an optimal distribution channel mix – selecting the best to ensure maximum profitability in the long run.

For travel sellers, there is a growing role for supporting travelers on their journey, making recommendations for experiences or helping when disruptions arise.

This report works to explore these changes, examining how the hospitality ecosystem has evolved and what the future might hold.

# Changing Expectations

**D**rawing on expert contributions from across the hospitality space, *Catalysts for Change* investigates how **traveler** expectations have evolved. It draws on research carried out for Amadeus' [Traveler Tribes 2033](#) project, which identified four distinct groups of travelers expected to emerge over the coming decade.

The key challenges and issues faced by **travel sellers** are assessed. As the key link between travelers and travel providers, agents remain vital to the success of the ecosystem.

Finally, this report will seek to understand the perspective of **travel providers** as they work to meet the changing needs of travelers. How are **hoteliers, mobility providers, and insurers** adapting to the post-pandemic world?

Highlighting the pace of change, the report features data from across the Amadeus ecosystem, illustrating the strategies that are blazing a trail within the industry.

The aim of *Catalysts for Change* is to generate conversations, drawing on data and research to accelerate the pace of evolution in hospitality.

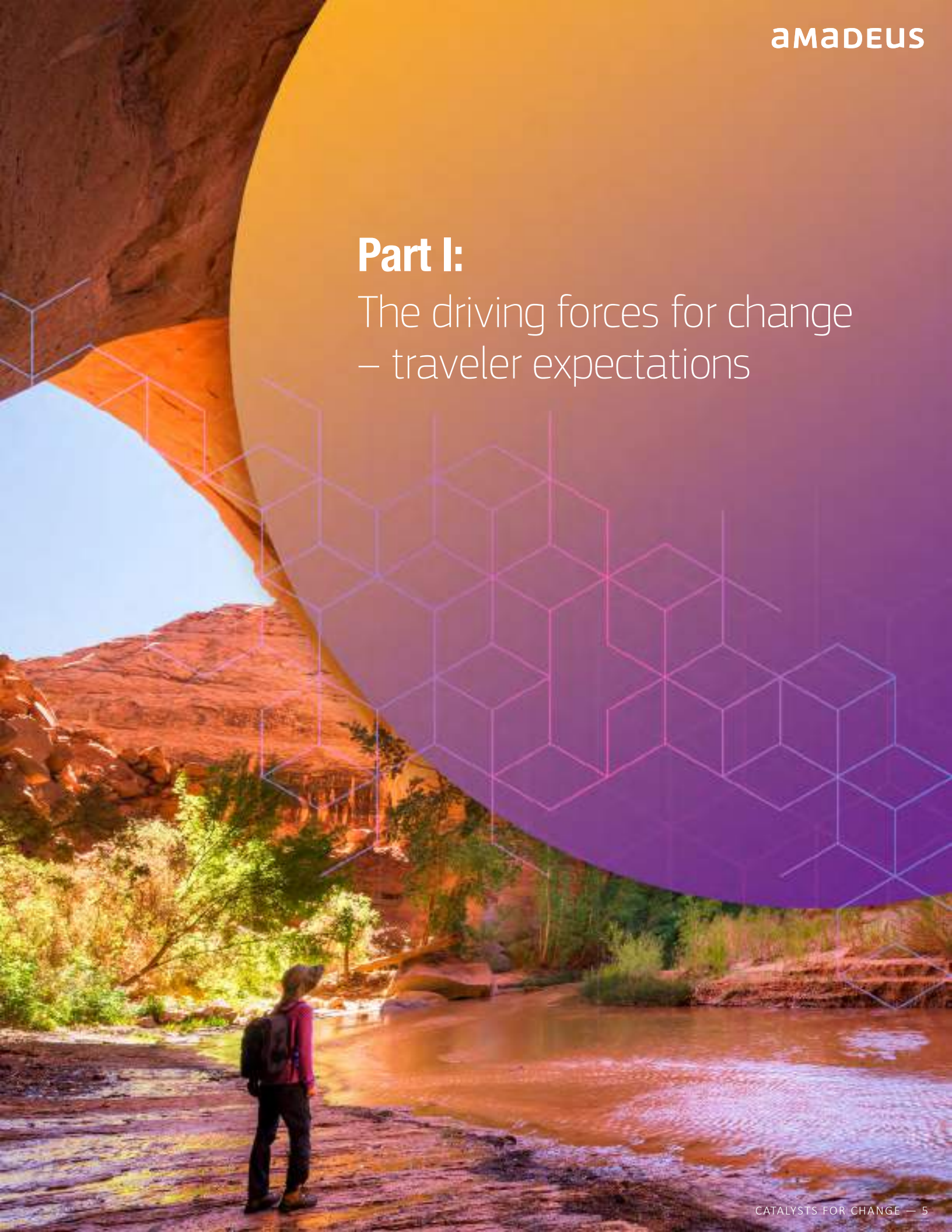
The work is focused on the travel ecosystem – of interest to any stakeholder with an ambition to better serve the evolving needs of travelers. This includes travel sellers, those who must offer access to the widest array of content, as well as travel providers and hotels, who must bring the experiences of tomorrow to life.

This paper draws from the expertise of Amadeus executives, interviews with key customers and industry leaders, up-to-the moment data, and an examination of wider industry trends to offer a snapshot of the travel sector and where it is headed.



## Part I:

The driving forces for change  
– traveler expectations



**T**o understand how hospitality is changing, let's begin with the traveler, the center of the ecosystem. How have their expectations changed over the past three years?

This section incorporates new research from Amadeus as well as industry insights to explore the key trends of today, before turning to the future with an overview of Amadeus' Traveler Tribes 2033.

## (I) Travelers

The pandemic has exposed previously underestimated vulnerabilities in the hospitality industry. Travelers have become more aware of the impact of their journeys on the environment – and thus **sustainability** is now a top priority.

This has been emphasized by several new pieces of research.

According to the [World Travel & Tourism Council](#) (WTTC), 83% of global travelers think sustainable travel is vital, while 69% expect the travel industry to offer more sustainable options.

Amadeus' own [research](#) supports these findings, with travelers suggesting greater availability of green modes of transport, increased transparency around the environmental impact of travel, or making sustainable travel more cost-effective are likely to be key drivers toward adoption. A report from Expedia Group also [finds](#) nearly two thirds of travelers would be willing to pay more for sustainable travel.



Greener experiences, then, are clearly at the forefront of the traveler mindset in this new era.

**Personalization** - defined as creating individual offers for each traveler that meet, or even exceed, their expectations - is also now of paramount importance.

Today, various travel players are moving in this direction, but this has not yet been applied at every step of the customer journey – something that would achieve the truly personal end-to-end experience travelers are looking for.

In keeping with a demand for personalization, travelers increasingly expect the hospitality sector to offer **seamless** journeys. This refers to travel using a variety of modes of transportation – all organized through a single booking process or ticket.

Travelers are also looking for value driven **digital solutions** – they want experiences that allow them to be in control of the process. Finally, in a direct response to the pandemic, travelers now look toward travel providers to offer **peace of mind** during a trip.

There is an acknowledged desire for clear, concise, and up-to-the-minute guidance on any restrictions around travel, as well as options that **protect** them should major changes impact their trip.

## Business or Leisure

Of course, travelers are not a monolithic whole – and different audiences are looking for different things in the post-pandemic world.

With inflation historically high in some key markets, **leisure travelers** are increasingly **price conscious**. This means they are willing to spend **more time searching** before booking, while **reviews** are more important than ever before.

**Business travelers**, too, have emerged with different needs following the pandemic.

Many are now seeking **prepaid content** when booking a trip. By ensuring the entire journey is paid for ahead of time, travelers remove the possibility they will personally have to cover costs, while **virtual cards** have grown in popularity for the same reason.

As working patterns continue to settle into the post-pandemic ‘new normal,’ there has also been a move toward **digital nomads**. With more people no longer having to work in a fixed place, they are free to move, even internationally, and these travelers have specific needs such as a balance of crucial technology with the comforts of home.

Finally, ‘**bleisure**,’ also referred to as **blended travel**, has continued to accelerate following the pandemic. Travelers are looking to maximize the value of their time – and this can mean adding on family time at the end of a trip or arriving at a destination a day or two ahead of a meeting to enjoy the cultural side of a location.



## (II) Looking ahead – Traveler Tribes 2033

**A**madeus recently unveiled the findings of [Traveler Tribes 2033](#), a unique study to understand the future of travel. The work identifies four Traveler Tribes that will develop in the next ten years, doing so by examining the future forces of change transforming travel, alongside emerging traveler traits, behaviors, and preferences.

The report suggests many travelers will be open to new and emerging technologies and will want to travel in more sustainable ways. But, with some travelers concerned about the proliferation of technology and the increasing need for cyber-security and data privacy, the industry must work together to ensure all travelers benefit from technological advances.

The four different Traveler Tribes set to emerge over the coming decade are:

**Excited Experientialists:** This group has a ‘try it and see’ approach to life and travel. Some 44% are without children and have a mid- to high-income job with flexible working options, which enables them to readily explore the world. They have a ‘you only live once’ (YOLO) mindset and are more likely than other travelers to act on instinct, making them the ‘anti-planners’ of 2033.

They favor less predictable and more exciting accommodation experiences and are also open to technology that helps them speed up certain aspects of their journey. Many expect to use artificial intelligence (AI) in an airport by the end of the decade, for example.

**Memory Makers:** This group takes a more simplified approach to travel: to make memories and visit places. Some 44% are aged 42 and over and are habitual in their travel behaviors. The future can be a daunting prospect for them. They put people first and place less value on technology and sustainability, reassured by existing methods.

However, despite their skepticism about technology, they are excited about virtual reality (VR) and augmented reality (AR) preview tours before making a booking.





**Travel Tech-fluencers:** This group includes the young business travelers of today, those with a forward-looking perspective on life. Some 48% of the group are under the age of 32 and their perspective is symbolized by how much technology they own.

However, there is discord when it comes to what excites and concerns them around the future of technology and travel. While many want to travel sustainably, it seems they are more conscious about sustainability options around their method of travel, rather than where they will be staying.

**Pioneering Pathfinders:** Included in this group are individuals that live a fast-paced life, always looking for their next adventure. Their life is in full swing, with 82% between the ages of 23 and 41. They like to plan but are not afraid of risk and are open to new experiences.

This group is more willing than others to let sustainability influence their decisions. They will also be very comfortable using all forms of alternative payment methods in 2033, whether via cryptocurrency or within a VR environment.

While there are differences between the four Traveler Tribes, what is clear is that much remains to be decided – a lot remains in flux.

One common factor that sits across all the Traveler Tribes is that, as technology advances through AI, biometrics, and the metaverse, the hospitality industry must be able to deliver more tailored journeys that meet the needs of different types of travelers – whether it is the desire for speed, comfort, reassurance or excitement.



## Part II:

Travel sellers - connecting  
travelers with providers



**W**ith these changing traveler expectations in mind, how will the travel ecosystem adapt?

In a note of consistency, travel sellers remain a vital link between travelers on one side and travel providers on the other. By communicating with customers to understand their needs, making bookings, and taking payments, they are uniquely placed to understand the changing landscape.

This has been illustrated by a swift return of bookings.

Global Amadeus air bookings stood at 127 million in 2021, increasing to 243 million by 2022, with trends in the first quarter of 2023 suggesting continued growth this year.

For travel sellers, having access to the widest range of content possible, on one platform, is more important than ever as they seek to provide travelers with exactly what they want, when, and where they want it. An ecosystem approach can help facilitate this.

Abhijit Patel, VP Global Distribution & Commercial Strategy, Choice Hotels, emphasizes that content remains key to the success of travel sellers: “Adding better content, in terms of description, pricing, rooms and attributes, as well as displaying prices in local currencies, has the potential to drive an improved booking experience for travel sellers, driving revenue.”

By boosting retailing capabilities and improving data usage, travel sellers have access to relevant content to maximize business opportunities.

Wes Bergstrom, Senior Vice President, Supplier Relations, BCD Travel, adds: “We work with Amadeus on many initiatives, always aiming to make the traveler experience easier and better as we know this will increase satisfaction and usage.”

“For BCD, the process is about making sure that we have the right content (properties, rates, and amenities) coming through from Amadeus as the GDS provider, then sharing this with travel sellers. Amadeus really becomes a core part of that entire experience as we integrate their hotel content with other third parties to bring best in class content to our agents, clients, and travelers.”

Bergstrom points to BCD Travel’s [TripSource](#) as an example of this idea coming to fruition – with a traveler able to see all the bookings for an entire trip in one place. The traveler remains at the center of the ecosystem – the journey is centered on them.

New ways of working have also emerged following the pandemic. With employees able to ‘work from anywhere’ with more frequency, they can be out of the office and away from team collaboration for much longer periods of time than pre-pandemic. This has driven demand for [group bookings](#), with corporate travel managers seeking to bring teams together more frequently.



Agents and meeting planners are seeking help in this area, with fragmentation making meetings, incentives, conferences and exhibitions (**MICE**) bookings harder to accommodate. There are calls to be able to hold larger numbers of rooms and book meeting spaces more easily, for example, in order to take advantage of this growing opportunity.

Mirja Sickel, Vice President, Hospitality Distribution, Amadeus, confirmed: “With many people now working offsite, then aiming to bring the team together at a hotel, they are increasingly looking to book meeting facilities. We have seen an uptick in demand for this kind of booking, especially among small- and medium-sized enterprises (SMEs).

“It has been hard for travel sellers to book meeting facilities alongside hotel rooms simultaneously. We are actively expanding the number of event solution providers in our distribution network to service this growing trend.”

Travel sellers are looking to do more with less and to **maximize productivity**. They want access to the broadest set of travel experiences to ensure they present the best opportunities to their customer – the traveler.

Samuel Selma, Executive Vice President Hotels, DMC & MEAPAC, Grupo Viajes El Corte Inglés, said: “By leveraging the power of big data, we are better positioned to provide tailored solutions that meet the needs of our customers and drive continued growth in a highly competitive travel industry.

“We can identify emerging markets and bring products to market more quickly. As we develop data-driven solutions, we recognize the importance of partnerships with companies like Amadeus.”

Sophisticated travel providers are also utilizing highly targeted advertising to communicate new products and services to travel sellers using the GDS, thus ensuring they receive the right information at the right time to optimize sales.

## Travel sellers – Five key takeaways

1

**Content** remains key, with travel sellers expecting to see all opportunities presented in one location

2

An **ecosystem** approach will allow agents to meet the changing needs of travelers more effectively – and drive revenue

3

**MICE** bookings for small to mid-size gatherings are increasingly important for travel sellers, as new ways of work create demand for group travel

4

**Data** will play a key role – with demand for more insight into booking, pricing, and occupancy trends

5

With travelers increasingly budget conscious, travel sellers are looking to **maximize efficiency** with new tools

### Memory Makers - Traveler Tribes 2033

Memory Makers put people first and are uncomfortable with technology encroaching on their lives. They perceive it to be a replacement for the human mind and something that devalues human connections.

This can be an opportunity for travel sellers if they are able to offer a creative and comprehensive service in one place. Travel sellers will be able to meet the needs of the less technologically savvy Memory Makers and inspire them with choices from across the travel ecosystem.



## Part III:

The connected journey –  
change is coming

**W**ith traveler expectations changing, and travel sellers adapting in response, the role of travel providers continues to evolve. Through an ecosystem approach, providers are well equipped to thrive in the post-pandemic world.

## (I) Mobility

The mobility sector is poised for rapid growth, as travelers and travel sellers are looking for more and different options. Mobility providers, forced to rethink their business models, are seeking to adapt and unlock new opportunities.

Fragmentation means differentiation is key, with new arrivals, including ride share and mobility-as-a-service companies, creating further disruption. Today, the industry remains comprised of multiple players who have their own data structures, operating systems, and underlying technology.

Integrating with a significant **ecosystem** is thus a challenge that requires resources, time, and investment.

A key challenge for mobility providers is how to reach customers through complex distribution channels operating on multiple systems.

Chay Lowden, Chief Product Officer, Green Motion, explains: “Amadeus’ flexible use of data is an asset to our business – data provision processes are automated, which means updating public-facing content is simplified. Amadeus too, allows us to recognize repeat customers so we can tailor our offering, suggesting automatic upgrades to larger vehicles, for example, or to pre-sell insurance.”

The mobility sector is refocusing on **multimodality**, with a recent study from [Kearney](#), commissioned by Amadeus, estimating multimodality could add 500 million travelers and €30 billion in additional revenue in Europe alone through 2030.



As Peter Altmann, Vice President, Mobility & Travel Protection, Hospitality, Amadeus, explains: “The mobility space continues to evolve quickly, with **ride hailing** services creating disruption and encouraging innovation in recent years. We are responding to calls from travel sellers to digitalize the traveler experience and will be working to integrate more of these new options into the Amadeus Mobility Platform.

“This is part of a wider expansion for Amadeus, as we look beyond a car rental and pre-arranged transfer model to offer new options, including car sharing, on-demand services, and even eVTOLs (electric vertical take-off and landing helicopters).”

Amadeus has seen its presence in the mobility space continue to increase over the past three years. In 2020, the company recorded 6.1 million car rentals, rising to 12.2 million in 2021 and 15.6 million last year. Bookings are also growing this year over 2022, according to the latest Amadeus car rental data.

## Excited Experientialists - Traveler Tribes 2033

Considering the coming decade, developments in the mobility space may appeal to **Excited Experientialists**. With fast-paced lives, their key transportation question is expected to be: what gets me to my destination as fast and as comfortably as possible? The prospect of swifter travel to destinations is what excites them most about travel in 2033. They want to be where the fun is – fast. The industry is responding with pre-trip check-in and keyless access to vehicles, all of which mean minimal queues upon arrival and during check out.

With a focus on digitalization, personalization, and multimodality, Amadeus is working to create an ecosystem to meet these needs – offering the most appropriate method of transport as quickly, efficiently, and securely as possible.



Illustrating a desire to innovate, Amadeus recently acquired a stake in urban mobility innovator [Eccocar](#). The start-up, based in Spain, is working to tackle disruption coming from changes in shared mobility and the ongoing **digitalization** of car rental. It offers several solutions, including micro-mobility and car sharing.

Time consuming paper check-in forms, old fashioned key fobs, and lengthy queues at car rental locations must be replaced with digitalized, personalized, and interconnected services.

In terms of **sustainability**, the mobility sector is working to offer information on the carbon emissions of each booking using dynamic data, while also beginning to offer carbon offsets.

Finally, safety remains at the forefront of the mind of the traveler. Mobility providers are expected to go above and beyond with rigorous **cleaning protocols**, including strict sanitizing procedures.



## (II) Travel protection

**T**ravel protection - which includes a wider understanding of insurance, to incorporate new products - was identified during the pandemic as instrumental in supporting the restart of the hospitality sector. When COVID-19 coverage was added to trip insurance, travelers had the confidence to leave home, knowing they were not going to be expensively stranded.

Amadeus global air traffic passenger data illustrates that travel's recovery is now well established. Amadeus air passenger volume peaked at 3.9 billion in 2019, but because of the COVID-19 pandemic, the 2021 total figure fell to 2.1 billion.

The recovery accelerated in 2022, with 2.9 billion passengers recorded by Amadeus, while the company anticipates 1.7 billion air bookings to be made between January and June this year.

*"As the pandemic introduced new priorities from both leisure and business travelers, Amadeus expanded its offering from traditional air travel insurance products to coverage for hotel and car reservations, illness, weather, and travel related delays to provide more options for travelers," Altmann explains.*

Travel protection providers are working to become more flexible as travelers return, in order to support them throughout the journey - and not just respond to claims when they are made.

Cedric DeMarchez, Head of Insurance, Payments Services & Travel Digital Distribution, Allianz, explains **personalization** and **digitalization** are drivers of change for the company: “We are working to become proactive in our relationships with travelers, it is no longer enough to passively wait for a claim to be initiated when a situation arises.”

DeMarchez points to [Allyz](#) - a digital platform that accompanies travelers before, during, and after a trip, with relevant products and services - as an example of the [partnership](#) in action.

Key to the evolving sector is **clarity of commitment**, clearly explaining what is covered – and what is not – to leave the traveler with no doubts on where they stand. Clear, concise policies are gradually replacing lengthy documents few read.

**Insurance assistance** has also come under the spotlight as protection providers work to help travelers with orientation and planning, offering them more interactivity during the trip.

In the past, insurers may have passively waited for a traveler to make a claim in the event of an airline cancellation. In the post-pandemic world, these services can be automated, so a passenger receives a virtual card allowing them to purchase food during a delay, for example, while a claim is automatically launched.

Finally, there has been a move towards **flexibility** as providers work to cater to last-minute changes to bookings or even ‘cancellation for any reason’ coverage.

Glenn Crippa, VP & Head of International, Accident & Health, Travel Systems, Chubb Insurance, said: “In response to demand from travelers, Chubb Insurance has worked hard to tailor the products we offer to customers – moving away from a one-size-fits-all approach that had predominated in the market before our entry.”

Insurers can now use a range of metrics – including day of the week, booking class, season, group size, destination airport, and more – to create a unique offer to a traveler, one calibrated to meet their specific needs.

Amadeus data reveals that, with respect to air bookings made through Amadeus, 7.5% more travelers booked travel protection in 2022 when compared to 2019, while the average premium has also increased by 37% over the same period.

More travelers, it seems, are willing to pay more for peace of mind.

## Travel Protection - Five key takeaways

- Travelers increasingly expect travel protection to be **integrated** into the booking process
- To drive demand, products must be **personalized** to meet the specific needs of a traveler – a one-size-fits-all approach is no longer sufficient
- Travel protection providers are increasingly expected to play an **active** role in the journey – providing support and peace of mind to travelers
- **Automated**, simplified claims processes are increasingly expected by passengers
- ‘Cancel for any reason’ policies are an area of growth – with guests expecting to see the **flexibility** offered during the pandemic become the norm

## Pioneering Pathfinders - Traveler Tribes 2033

Changes in travel protection are likely to delight **Pioneering Pathfinders** from Traveler Tribes 2033. Given their fast-paced lives, they see AI-based planning as a time-saving tool. This trust in technology extends to trust in data. Over half of Pioneering Pathfinders will share data about their earlier trips, medical history, and biometric profile with all relevant parties - from airlines to accommodation and protection providers.

With a focus on automation, effective use of data, and supporting the traveler throughout the entire journey, enhanced travel protection is likely to be increasingly attractive to this group.



## (III) Hotels

**A**s the industry continues to develop, hoteliers are tasked with meeting the changing needs of travelers throughout their journey – whether it's the pre-arrival phase or on property.

In order to capture the attention of travelers and travel sellers alike in the wake of the pandemic, hoteliers are doubling down on **demand generation** efforts. To ramp up bookings and avoid being outperformed by their competitive set, hoteliers from all property segments and sizes are turning to **business intelligence** data to inform their revenue strategies. With access to forward-looking on-the-books market insights, hoteliers no longer need to rely on guesswork or historical data to determine the best revenue management strategies.

Agathe Fabron, VP, Connected Clients with Accor, explains: “Amadeus helps greatly with market intelligence, giving us insight into our market share globally, regionally, and nationally – and then also from an individual agency, which can be very valuable.”

Business intelligence is also a critical component of effective hotel marketing. Identifying peak and need periods, along with other booking trends, hoteliers can use this information to launch

**digital media** campaigns. With cross-channel advertising plans in place, designed to connect with potential guests through targeted, persuasive messaging across paid search, display, and social media, direct bookings can be enhanced.

Hotels must also meet guests where they shop – **optimizing presence across distribution channels**, including its direct website, online travel agency listings, global distribution systems, and others. Offering different marketing campaigns and sales strategies to each will allow a property to reach the widest customer base, capturing the largest audiences – be it business, leisure, or group travel – to deliver the right offer at the right time on the right channel.

Mindful of the guest experience, hoteliers are focused on **personalization** as a key to help build more memorable stays, making **attribute-based selling** (ABS) an especially effective strategy.

These value-add features can include everything from booking a specific room, to bedding or pillows, right through to third party offerings, such as theatre tickets or restaurant reservations.

Similarly, **integrated solutions across website, booking engine, and guest management technology** make it much easier for hoteliers to truly understand their guests and interact with them according to their preferences. Hoteliers can, for example, look to create guest profiles by using data from systems across the hotel tech stack. Drawing from loyalty schemes or previous stays, room preferences can be met, spa visits offered, or late check-out included.

As the market for **'bleisure' or blended travel** grew in response to the pandemic, hoteliers pivoted to offer packages which combined elements of both work and business in order to drive demand. Now, hoteliers are working on building new offerings that entice travelers to extend their work trip through the weekend or even to work remotely during the day and enjoy the hotel amenities in the evenings.

As travelers become more focused on the environment, it is also increasingly valuable for hotels to be able to showcase their **sustainability** attributes during the shopping and booking process. Larger corporate travel managers now examine green criteria when it comes to booking – and if a hotel does not meet the required standards, it might not be used in a corporate program.

*“Highlighting a property’s sustainability efforts is becoming an increasingly important tool for hoteliers to use to attract guests,” explains Sandra Taylor, Managing Director, Travel Industry Relations & Sales Worldwide, BWH Hotels.*

Once a guest is on property, new tools can **drive operational efficiency** to surprise and delight them– beginning with **digital experiences**.

Currently this can mean app-based room keys, mobile payments, and voice on-command technology – but much more can be achieved.

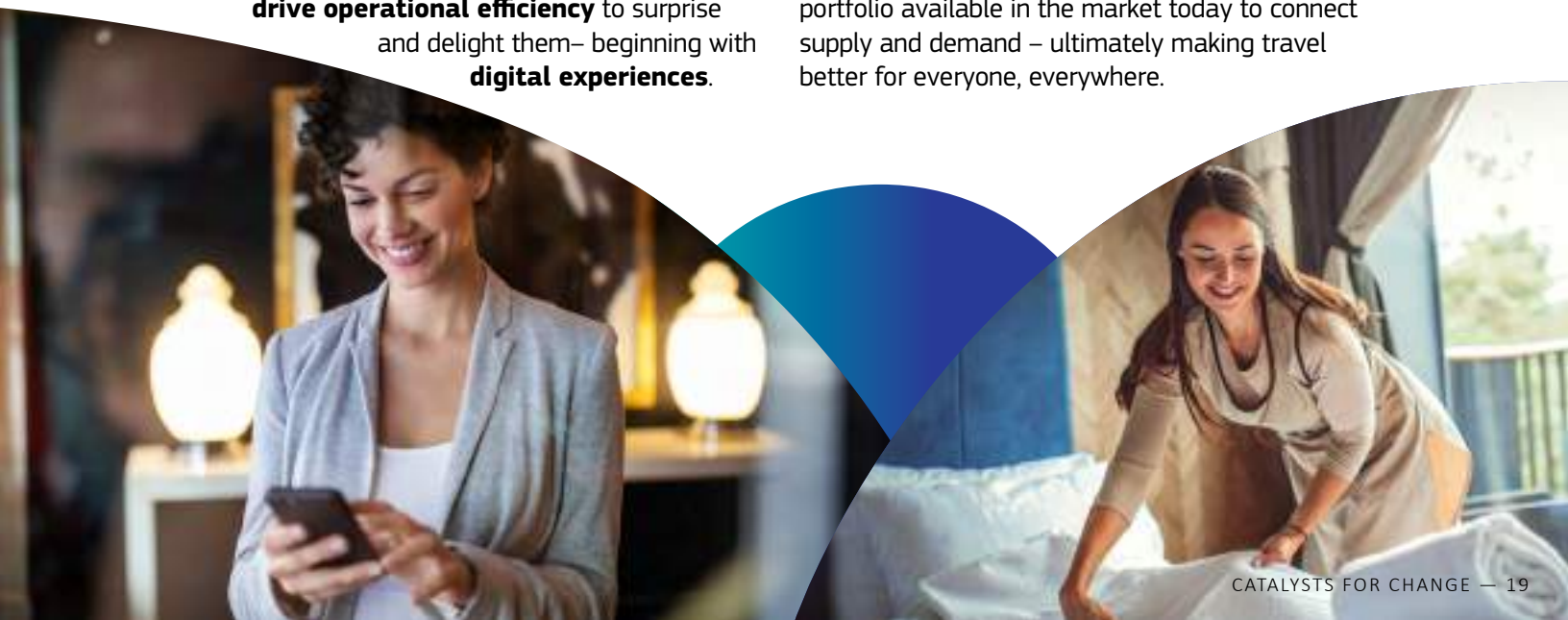
**Virtual cards** are seen as an exciting area of growth, too, allowing for easier reconciliation for corporate travel managers, while reducing the expense/reclaim burden on travelers themselves.

In room, both tech-forward and health and safety conscious guests may no longer want to touch the remote control, for example, or use the guestroom telephone. If they need to call for assistance, or even play music, watch shows, set alarms, or request more towels and personal hygiene items, they will want to do so in a contactless manner.

To efficiently manage guest requests and daily operations, hotels using **service optimization** technology are able to deliver on personalization expected by the guest as well as automate tasks, housekeeping, and maintenance to ensure guest satisfaction even with ongoing labor shortages.

Recognizing and delivering on guest preferences should extend beyond individual travelers to groups as well. With meetings and events returning at a rapid pace, an essential component of a hotel’s growth strategy includes leveraging cloud-native **sales and catering** software to track all group needs and requests – from planning phase through to flawless event execution.

With a unique position at the heart of the hospitality **ecosystem**, Amadeus provides the most comprehensive hospitality technology portfolio available in the market today to connect supply and demand – ultimately making travel better for everyone, everywhere.





## Travel Tech-fluencers - Traveler Tribes 2033

Developments in the technology and accommodation space are likely to help hoteliers meet the evolving needs of **Travel Tech-fluencers** from Traveler Tribes 2033.

This Traveler Tribe will continue to stay in global hotel chains, but they are more likely to be loyal fans if these chains share their forward-looking mindset. More than two thirds are willing to supply fingerprint data to allow easy room access and to have their room configured in a personalized way, for example.

On arrival, the stay can be further personalized. Can room cleaning be offered every other day, rather than daily, to drive a sustainable stay? New tools can offer seamless touchpoints like contactless hotel check-ins, digital room keys, room service robots and AI-enabled text or voice messaging.

With a greater reliance on data to meet the evolving needs of guests, Amadeus is well-positioned to help hoteliers revolutionize their offering.



## Hotels – Five key takeaways

Effective use of business intelligence insights and media campaigns to inform a comprehensive **multi-channel distribution strategy** will be vital in demand generation

**Digital experiences** gained renewed prominence during the pandemic, with travelers now expecting them as standard

**Personalization** remains a key driver of change in hospitality, with guests expecting stays to reflect their preferences more accurately

Technology is a must to help understaffed properties **automate daily operations** and manage critical event details with ease

Integrating hotel stays with **travel protection** and **mobility** will allow the industry to take steps toward the creation of end-to-end journeys



## Conclusion

**C**lear demands for change can be heard across the hospitality industry and spending time tracking the needs of travelers remains critical.

**Personalization** of travel will be key – with travelers expecting their preferences to be met, with the minimum of personal input.

In addition, research has shown that over the last three years traveler expectations have significantly evolved, with **seamless**, **digital**, and **end-to-end** journeys now expected as standard.

**Sustainability**, too, has grown to become a central focus. Many travelers are keen to minimize the impact of a trip on the environment and it is vital the sector offers them the tools to do so.

An **ecosystem** approach presents the hospitality industry with an opportunity to respond effectively, allowing comprehensive content to reach travel sellers to drive sales. Hoteliers, too, have opportunities to cross-sell, in order to maximize revenue.

Integrating hotels with travel protection and mobility will allow the sector to create new experiences – **automation** and **flexibility** – with the traveler set to benefit.

Together, the industry can build the open, connected platforms of tomorrow that will empower the hospitality sector to deliver the best possible experience to their customers.

### Methodology

Catalysts for Change was completed using analysis of interviews with executives and data from Amadeus.

Also interviewed were representatives from Accor, Allianz, BCD Travel, BWH Hotels, Choice Hotels International, Chubb Insurance, and Green Motion.



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# Shaping the Future of Hospitality Together

Amadeus powers more personalized  
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