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SKIFT CEO'S LETTER

In your hands is our largest annual editorial effort from the Skift reporting team: the big travel Megatrends for 2017 and beyond.

These megatrends are our work on connecting the dots through Skift's intensive daily and long-term research coverage of various parts of the travel industry, our hundreds and hundreds of hours of talking directly to the leaders and operators in the travel industry, and our surveys, interviews, and focus groups with travelers throughout the prior year.

As Skift sees it, travel is the global crucible for everything. It is where the largest consumer and tech trends first meet and are quickly tested. Everything converges in travel.

We bring these insights to bear on our megatrends. Some of these megatrends are sexy, some are thoughtful, but they're all key to understanding where travel is going in the next year, in an age of general larger turmoil.

2016 will go down as the seminal year where travel — the voluntary movement of humans from one place to another — became a key element of every major flashpoint in the world. All these global and local disruptions are happening even as the amount of people traveling is going up and up, and the digital changes continue to morph traveler behavior and industry forces at work.

Here's 2016 for the travel industry in a big sweep: Big hospitality is still in the throes of consolidation, alternative accommodation has become mainstream while still fighting regulatory issues, while the backend tech ecosystem is as vibrant as ever with new startups entering every week. Online travel saw some major business and management changes and challenges for the big four — Priceline, Ctrip, Expedia, and TripAdvisor — even as the pace of acquisitions in the sector has slowed down; tours and activities had a breakthrough year as all major online players are now paying attention to it; new consumer startups in online travel struggle to break through. The airline sector saw huge and renewed energy around low-cost airlines, particularly in long-haul, even as the arms race on the premium side seems to have reached an equilibrium; meanwhile airports everywhere seem

to be getting smarter about tech and food and beverage offerings. Destinations are reeling from local and global upheavals, with the safe mainstays seeing record arrivals. Travel agents and packaged travel seem to be making a comeback in an age of too many choices. Cruises are still figuring out how to hunker down and focus on evergreen destinations, as their forays into new ports haven't taken off. Travelers are tired of too much technology that has overwhelmed their lives, and there is a growing movement of seeking more human connections as part of the travel experience.

2017 will revolve around a few themes, as we see it: uncertainty around the world due to the rise of neo-isolationism, even as an increasing number of destinations are dealing with too many tourists; new breakthroughs in voice search and artificial intelligence could start changing how we book online travel; Facebook and Google will continue to define the larger platform world for everyone including the travel players; big hospitality will look beyond acquisitions to now rationalize their portfolios and build new services; the profile of food and dining out will continue to rise as the center of all travel experiences, and increasing use of smart tech to enhance the human touch will continue to be refined.

This is what Skift will be focused on in 2017, and of course we'll be ready for the unexpected. We are now in our fifth year of existence, and our storytelling ambitions are getting bigger. Expect a lot more from us. Our promise is to continue to surprise you with our products and services.

Email me at ra@skift.com if you have any feedback or want to work with Skift to continue to define the future of this amazing industry we all love.



 Rafat Ali
Founder & CEO, Skift

**HUMANITY
RETURNS
TO TRAVEL,
IN AN AGE
OF DIGITAL
OVERLOAD**

By Rafat Ali



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**SKIFT
TAKE**

Hospitality is all about the very human trait of empathy. And businesses need to remember that humans should remain front and center to create incredible experiences, helped — but in no way supplanted — by modern technology.

Back in early 2014, Skift came out with a new report and framework for looking at the digitally adept traveler, what we called “The Rise of the Silent Traveler.” This is how we described it: “The rise of digital has given rise to a new kind of traveler adept at all available online and mobile tools, and uses them to jump across all industry-defined silos. These new travelers don't need tons of handholding, they shun human interaction, and know their way around everywhere they go. This presents the global travel industry a paradox: the human part of the service economy may become less and less important.”

Jump three years ahead, and you can see the extreme effects of digital-led life: the casual tyranny of pervasive connectedness, constant virtual stimuli and hyper distractedness have taken over our lives, and it is even more pronounced when we travel. People are overwhelmed and all of this has happened as tech as a differentiator for travel brands is becoming more of a hamster wheel, and increasingly becoming commoditized.

In summer of 2016, Skift dove deep into the habits of Supertravelers, those early-adopter, avid, and demanding travelers, mainly because we see them as a mirror to the larger changes happening in consumer behavior — especially digital habits — and how they get reflected and fulfilled in travel.

The biggest lesson learned from talking to the high maintenance, highly connected travelers?

They want the humanity back in travel.

These travelers have more power in their iPhones than most airlines had in a mainframe 30 years ago, but that doesn't mean they want to be left to navigate this giant world all alone after all.

The travel brands should strive to understand how the experiences they provide make travelers feel. Travel is a huge investment of time and money; travelers will forget what companies offer through

tech, what they say in their ads, but they will never forget how these travel brands make them feel.

The concept of big data has trickled down to the average consumer, and now they want to see what giving up all this personal information can get them, and they want the good news delivered by people, not apps (except sometimes they want them, too).

Smart brands have to learn to combine technology and customer service in a way that pairs digital efficiency with human intelligence.

All of the data in the world is much more powerful when placed in the hands of a well-trained, empathic person who can anticipate, be flexible, and help steward a cohesive experience. To succeed in this, the travel industry must not look to the temptations of AI and automation in order to provide something novel. Rather, they should focus more deeply on training staff and creating a human-centric, empathetic experience.

It's great to compare prices using Kayak, Google, or Skyscanner and to read the TripAdvisor reviews, but when the bartender remembers that you prefer a particular brand of organic tequila with 100 percent pure blue agave, or the hotelier, without asking, recalls that steak and eggs with a mimosa is your breakfast of choice, then you'll keep coming back.

Real loyalty, the kind where you become a brand advocate, isn't a data point but is an emotional connection or personal experience. The “big” in Big Data will truly emerge as a gigantic and effective force when it enables people — yes, well-trained and empathetic people — who work for travel companies to relate to customers, where possible, as flesh-and-blood individuals.

In an age of digital overload, simple human spaces, great service, and great food and drink will be even more relevant. The travel and hospitality industry can be a huge beneficiary of where the world is culturally right now. And it should double down.

OVERTOURISM GOES MAINSTREAM, DESTINATIONS GET SMARTER ABOUT SOLVING IT

By Jason Clampet

As it turns out, you can have too much of a good thing.

This year's lesson involves Iceland, where we sent a reporter this summer to watch the crowds of tourists emerge and fill Iceland's most popular sites to the bursting point. This nation of 330,000 welcomed three million people in 2016, and the fact that it's near impossible for a local to rent an apartment in Reykjavik is not a detail captured on the tourist map.

Iceland is just at the beginning of being reshaped by the forces of the global travel industry, and its leaders are aware that they need to do something. At Skift Global Forum in September, Visit Iceland's director Inga Hlín Pálsdóttir said, "I wouldn't say we have a crazy problem at the moment. It's not just about bringing tourists, it's about being sustainable as well. I mean, tourism is important for Icelanders and we're starting to realize it is the biggest industry and we need to be careful how we treat it... We need to be careful about our lifestyle and sustainability around nature."

Since our story this summer, nearly every major media outlet — from The New York Times to the PBS NewsHour — has written their own version of the story. All of a sudden, overtourism is on everyone's radar.

We've been talking about overtourism since Skift launched in 2012, and back then we started by looking at Elizabeth Becker's groundbreaking work *Overbooked*. She looked closely at multiple destinations, but none stood out like Venice, Italy.

The city of water has become a city of visitors where it's easier to find a knock-off Louis Vuitton purse than a loaf of bread. It hasn't improved since Becker's book came out; city residents marched through the streets

SKIFT TAKE

A global surge in tourism, driven by the growth of low-cost carriers and middle class families across the world who are beginning to vacation abroad, has had deep ramifications for the world's most popular destinations. Some have tried to manage tourism by limiting the ability of tourists to stay in cities or pushing less popular areas as bona fide tourist destinations. The jury is still out on whether these destinations will be able to effectively manage tourism, or will continue to struggle in the face of mounting backlash from their citizens.

in November to protest dramatic population loss, cruise ships, and rapidly declining quality of life.

It's not all doom and gloom, since various destinations are approaching their challenges from different angles. Part of the solution to overcrowding and the negative influences of tourism have been a policy of directing travelers out of hubs and city centers to suburbs and lesser-known neighborhoods.

For the last few years, New York has balanced its influx of tourists by pushing a five-borough strategy that gets visitors out of Manhattan and into Queens and Brooklyn neighborhoods they wouldn't have set foot in 10 years ago. It's a release valve that spreads the tourist wealth, and disruption, around the city. NYC & Company has done it through compelling content and partnerships with local stakeholders, many of which have helped revitalize public spaces throughout the city. And while the majority of Airbnb's listings are in popular neighborhoods, it has played a role in getting visitors to new neighborhoods and demonstrating to hoteliers that smaller properties in previously ignored neighborhoods may be a good idea after all.

In Spain, a nation that's seen its tourist numbers hit new heights every year, they're attempting a political approach in some cities. Barcelona is foremost among those, where a narrow core of the city has become a Lollapalooza of tourism and locals regularly spray paint "Tourist Go Home" on walls. The current mayor rose to power on a populist wave that demanded action. So far we've seen limits to approvals on new hotel construction and a crackdown on vacation rentals and Airbnb. As strategies go, it's more reactive than prescriptive, but it's a response that locals have rallied behind.



THE FIFTIES ARE THE NEW TARGET DEMOGRAPHIC FOR TRAVEL BRANDS

By Jason Clampet

SKIFT TAKE

Think of them as tweeners. And that's the point: Travelers in their 50s, squeezed between Gen Xers and Baby Boomers, are breaking new ground in their global meanderings. Brands had better pay attention, although Fifties may be tricky to pigeon-hole.

As with any demographic group, the Fifties are as much about a mindset as an age group. In this case, they're the consumer group that has the technological savvy of the millennials, with the realities (read: employment, children in or out of the nest, and divorce) of the Baby Boomer generation.

These 52 or 59-year-olds seem much "younger" than their parents were at this stage because of medical advances, job hopping, and starting families later in life. A maturity with lots of youth thrown in, so to speak, and with that "youth" comes opportunities for brands that develop deep relationships that can last decades.

The Fifties don't need a brand to introduce them to "experiences," they just want the fastest way from the theme park to the local restaurant and

on to their boutique/independent hotel or Airbnb. And, yes, they'll most likely be taking an Uber XL rather than a Hertz rent-a-car (or even airport shuttle) to get there. They won't be caught dead on a packaged tour, but in a pinch they respect the efficiencies of a fast, casual restaurant.

It's often said that youth is wasted on the young, and modern travel illustrates that well. Because of employment patterns, Fifties have a level of choice that younger demos don't, but they are also cautious with their spend because of family responsibilities and long-term goals.

Still, they are trip planning, not estate planning.

For Fifties, a short-term rental or a hostel isn't a budget-first necessity, it's an option. So yes to that Airbnb apartment booking in Madrid or Generator stay in Amsterdam. And yes, too, to a traditional hotel booking — it just makes sense so often. On the flip side, they're part of the fastest-growing group of Airbnb hosts.

Smart brands also consider the spending power of Fifties. Nielsen estimates that in 2017 nearly 50 percent of the U.S. adult population will be age 50 and older and will control about 70 percent of the country's disposable income. While some of that is in the hands of older Baby Boomers, the Fifties crowd has more to spend than millennials and they have a clear preference for value over luxury.

The promise and challenge for marketers is not just knowing what buttons to push but when. There's the family trip and the business trip, but also single women or men traveling as a group, multi-generational escapes, adventure breaks, and romantic getaways. All of these are the same consumer, it's just a matter of when marketers hit them with a message.

The Fifties provide a bridge between the Boomers and Gen-X and have keen insight from Gen-Y (their kids). As a group, Fifties allow brands to target changing consumer behaviors among a set demographic that contains habits of groups much younger and much older at the same time. If travel brands want to know what the future holds and what the present demands, Fifties are the place to start. ■





FESTIVALIZATION OF MEETINGS AND EVENTS

By Greg Oates

SKIFT TAKE

Conference organizers are developing more multidisciplinary programming that pulls from both the business and creative industries, creating a new convergence of experiences that help brands plug into business events in more ways.

At the South by Southwest Conference & Festival 2016 (SXSW) in Austin, attendees were having two-way conversations with human-looking Japanese robots to showcase the newest innovations in artificial intelligence. Anthony Bourdain spoke about food, fear, and the future of travel; President Obama called on the civic-tech community to change the world; and Drake and Iggy Pop played to packed, albeit very different, audiences. Swarms of delegates also visited a life-size replica of the Coney Island ferris wheel where USA Network was promoting its popular TV series Mr. Robot, partially filmed in Brooklyn's theme park.

The growing convergence between the business and creative industries, as well as boredom with the conference industry status quo, are disrupting how organizations design their conferences to better engage increasingly fractured and distracted audiences.

The festivalization of meetings trend started with the multidisciplinary programming at SXSW and TED, bringing together thought leaders from different sectors to share their views on driving change in a new era of global connectivity. That has since inspired a surge of new "innovation conferences" in cities of all sizes worldwide, ranging from Murmuration in St. Louis to Tech Open Air in Berlin. C2 Montreal, co-created by Cirque du Soleil and the Sid Lee marketing agency, is another cross-pollinating mashup of programming that bridges commerce and creativity (hence the "C2").

The formula behind these events is generally the same: Pull together the most inspiring minds in

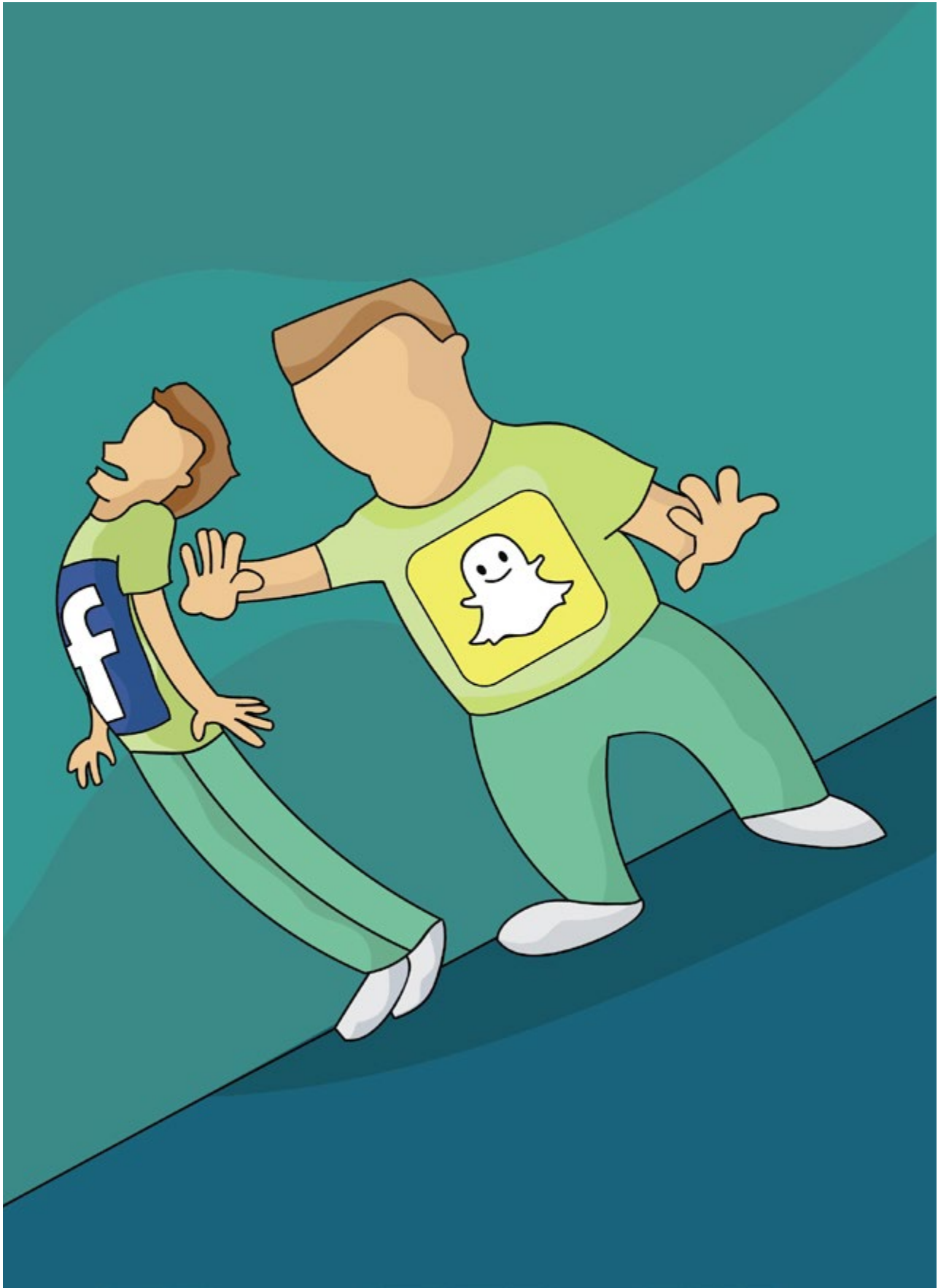
business, tech, media, science, education, art, and culture inside a cross-section of colorful venues and collaborative spaces. Then hit "blend" with integrated online and offline catalysts, virtual and augmented reality experiences, startup pitch competitions, live music performances and art exhibits, and local offsite experiences to create spontaneous collisions between participants in unprecedented ways.

The Google I/O 2016 developer conference in California, where Google launches its newest technologies, is a good example of the festivalization of meeting design. Inspired by cult-like events such as Coachella and Bonnaroo, Google I/O 2016 took place for the first time in an outdoor amphitheater next to funky pop-up geodesic domes and stacked shipping containers all shape-shifting from meeting venues in the day to social spaces at night.

The big picture takeaway here revolves around driving higher brand engagement by tapping into both the professional and personal interests of attendees. Meetings have always been platforms for education and marketing, but the blending of live user experiences and human-machine interfaces with previously considered disparate content helps brands plug-and-play into more places with more people at more times. London Technology Week and the Consumer Electronics Show in Las Vegas, for example, have grown into citywide behemoths based on their success as "live-marketing brand experiences."

So where next? The Freeman event design company created a new Design Leadership Council, with leaders from organizations such as the U.S. Military Cyber Command and Walt Disney Imagineering, to experiment with more diverse convergences between creative environments, new technologies, innovative brands, and visionary people.

"The principle I apply is really to bring wicked teams to wicked problems," said Bruce Mau, chief design officer at Freeman. "With all the new problems today, you have to think about what's needed to synthesize all of the content input today to produce a new kind of synthetic media output. It's not a singular practice anymore. It's all built by teams, so you need people who are experts at teams." ■



DIGITAL PLATFORM DISRUPTION IS HERE TO STAY

By Andrew Sheivachman

**SKIFT
TAKE**

Sitting out the race to figure out Snapchat marketing or develop robust partnerships with trusted content providers is a losing proposition for travel companies, regardless of their position in the industry.

When targeting potential travelers through the myriad marketing channels available today, fragmentation becomes one of the biggest challenges and will only intensify in the coming years. Snapchat, Instagram, WeChat, Twitter, Facebook, Google, and text chat are all areas that travel brands need to get used to as traveler behavior shifts in the digital space.

The announcement of Snapchat's IPO in mid-November 2016, for instance, shows just how ubiquitous and mainstream these channels have become. A Skift trends report found that just 14 percent of Snapchat users are over 35, compared to 20 percent of Instagram users and half of Facebook users.

Snapchat itself reported earlier this year that it serves 10 billion videos a day to about 100 million daily users.

If you want to reach the new generation of young millennial and gen Z travelers, these social media

platforms are the place to be. Most travel brands, however, haven't managed the transition to visual and short-form content effectively so far.

"Instagram and Snapchat have exploded in recent years; the user base is certainly there but at the same time, they leave something to be desired for advertisers," states the report. "Visual content is also a challenge on the production side. How travel brands leverage both branded and user-generated content to engage potential customers will vary. One certainty is that travel should continue to experiment with visual content and the platforms that attract millions."

Starwood Hotels & Resorts has been one of the more active travel advertisers on Snapchat, deploying Snapchat Geofilters in 2016 to target potential Starwood Preferred Guest loyalty members. National Geographic Traveler as well turned to Snapchat in 2015, deploying a video content Discover channel on the platform.

You can also see Snapchat's influence on other social networks that are now working to leverage the power of ephemeral, yet targeted, video content. Facebook is currently developing a channel named Discover to better curate news and fight the influence of so-called "fake news" on its service. The channel will showcase content from selected media providers on users' news feeds, and open up a new medium for targeted advertising. Twitter already has a similar feature that targets users with videos they're interested in.

Furthermore, adapting to these platforms requires a far-ranging culture shift toward experimentation and away from the tried-and-true channels of print, TV, and digital display advertising. Even established platforms like Twitter are being crowded out by mixed-media sources like Instagram.

Hotel brands are leading the charge when it comes to experimenting with creative cross-channel content that appeals to guests and resonates with their lifestyles. Marriott International, for instance, has partnered with TED to provide a combination of in-room videos, social media content, and real-life events for business travelers.

"When you're on the road, that's when the best ideas come to you, or you start to see a new angle to an existing problem," said Matthew Carroll, vice

president and global brand leader for Marriott Hotels. "This is a unique benefit of travel that our target consumer really values. Together with TED, we hope to offer our guests fun and engaging moments of fresh inspiration that inspire new perspectives."

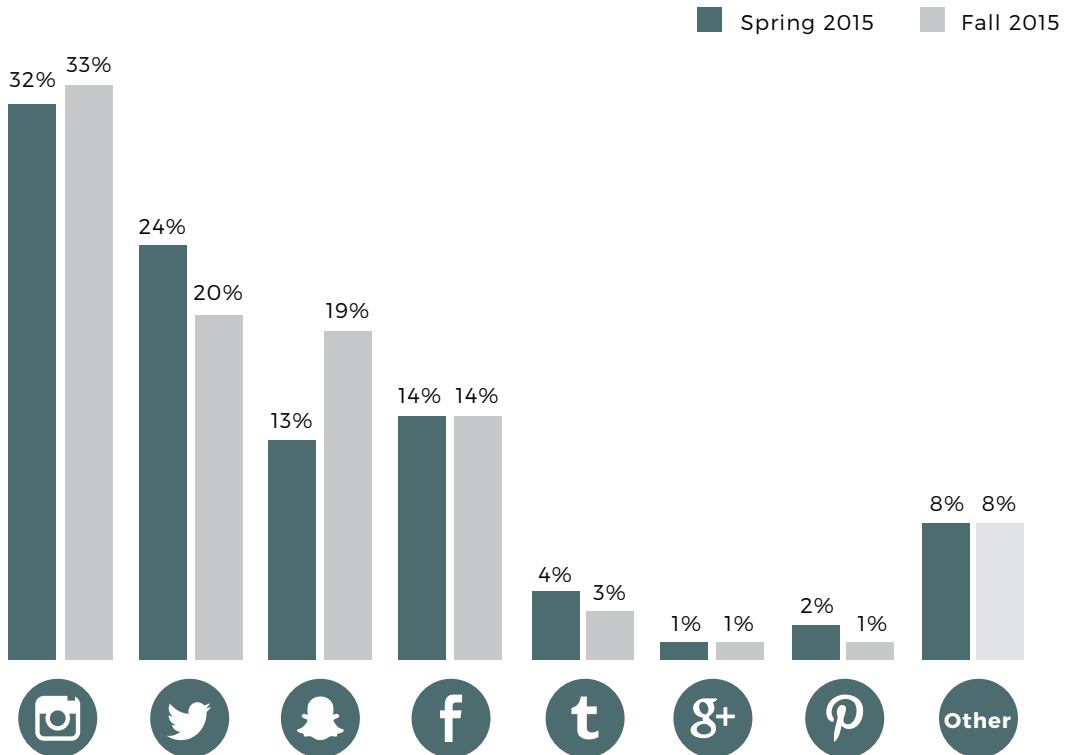
If you want a view of disruptions to come, look to China, where WeChat plays an almost omnipotent role in a consumer's relationship with brands. All interactions – from discovery to booking to payment – take place within its closed environment and make the traditional web appear as a non-factor for

many users. Want to book a hotel, then a restaurant reservation and then a massage? Want to pay in advance too? That's just a few taps away. It's what Facebook and its platform peers are aiming for, yet are not achieving yet.

Expect smart travel brands to embark upon similar partnerships and look to leverage digital media across multiple platforms as fragmentation continues to increase. ■

U.S. TEENS LOVE INSTAGRAM

% of U.S. teens who consider the following social networks the most important



Sample size = 9,400 teens with an average age of 16 years

Source: PiperJaffray

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A YEAR OF RECKONING FOR EUROPE, THE WORLD'S BIGGEST TOURIST DESTINATION

By Patrick Whyte

Europe is at a crossroads. The UK's Brexit vote, terrorist attacks, and the continuing migration crisis have all contributed to a feeling of malaise across the continent.

At the same time, it remains a major tourist destination. In 2015, according to figures from the United Nations World Tourism Organization (UNWTO), Europe welcomed 608 million international tourists – twice as many as nearest challenger Asia and the Pacific. Seven of the world's top 10 destinations are in Europe, as are five of the biggest outbound markets.

But those statistics don't tell the full story. Although numbers have continued to increase over the years, other areas are outpacing Europe in terms of growth, and perhaps more importantly, Europe's share of the travel pie has declined. In 1990 it represented 60.1 percent of the world's total; last year it was down to 51.2 percent.

Early numbers for 2016 in Europe also aren't promising. While some countries such as Spain

SKIFT TAKE

Despite being the world's largest tourism market, there's a sense that things are changing for Europe. While other regions are catching up, Europe is going through a period of upheaval. The specter of terrorism, the destabilizing Brexit vote, and upcoming elections all mean that 2017 is going to be a pivotal year.

have seen double-digit percentage increases, the likes of France, Belgium, and Turkey have struggled.

Not only is this likely to continue with the growth in popularity of other regions but also because of the myriad challenges facing Europe in 2017.

The UK's narrow vote in favor of leaving the European Union has led to a great deal of soul-searching. The country is the fourth biggest outbound tourism market in the world and each year welcomes more than 30 million tourists – Brexit threatens both of these points.

Already the value of the pound against the euro has plummeted, making it much more expensive for outbound UK tourists to travel to popular beach destinations such as Spain and Greece.

New Prime Minister Theresa May has yet to fully relay what the relationship with the rest of Europe will be after the UK leaves. A departure date of 2019 has been suggested, but that gives just a two-year window to negotiate agreements in

areas such as aviation and visas – both crucial to the travel industry.

Of course the devaluation of the pound makes the country more appealing to visit, but a lack of progress on reforming visas for Indian and Chinese visitors means the country is missing out on much-needed revenues.

Continental Europe is still reeling from a series of devastating terrorist attacks over the past year with some areas still yet to fully recover.

In November 2015, 130 people were killed in Paris, including 89 at the Bataclan theater, and in March 2016, 32 people were killed in coordinated suicide bombings in Brussels.

While the French capital has suffered from a number of other issues, including floods and transit strikes, it's likely that the threat of terrorism contributed significantly to the fact that it welcomed a million fewer visitors in the period between January and June 2016.

Terrorism and political instability also caused a terrible year for tourism in Turkey. The destination is a key outbound market for countries such as the UK and Germany, and tour operator Thomas Cook said bookings had plunged by 40 percent.

Europe is also still coming to terms with a continent-wide refugee crisis. Migrants fleeing wars in Syria, Libya, Afghanistan, and Iraq continue to arrive in search of a better life. Although numbers decreased in 2016 compared with 2015, authorities are still facing a massive relocation challenge.

Adding to the cocktail of issues facing Europe are elections in two of its biggest countries, which have the power to greatly alter the continent's direction, and potentially its tourism industry.

German Chancellor Angela Merkel is up for re-election in the second half of the year, and in France, far-right nationalist Marine Le Pen is hoping to ride a similar populist wave as Donald Trump and the pro-Brexit vote.

Individually these factors are not insurmountable for a mature tourism market such as Europe, but together they have the potential to cause a massive headache for the travel industry in 2017. ■

EARLY NUMBERS FOR 2016 IN EUROPE ALSO AREN'T PROMISING. WHILE SOME COUNTRIES SUCH AS SPAIN HAVE SEEN DOUBLE-DIGIT PERCENTAGE INCREASES, THE LIKES OF FRANCE, BELGIUM, AND TURKEY HAVE STRUGGLED.

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CORPORATE TRAVEL TECH IS IN UPHEAVAL

By Andrew Sheivachman

While the corporate travel ecosystem is resistant to change, shifting traveler behavior and the primacy of mobile as a booking channel are compelling travel management companies to refine and retool their technology.

Experts expect further consolidation in the space, as major industry players look to pivot to a more technology-focused strategy instead of the traditional service-based model.

Corporate travel companies are learning from consumer technology giants how to improve their digital booking experiences — and therefore better control the business traveler's journey from beginning to end.

Traveler expectations don't merely reflect what they're used to in business travel anymore. Leisure travel has trained business travelers to expect intuitive booking tools and trip management options.

"If your mobile newsfeed [on Facebook] is out of sync with what's on the desktop, that's unheard of," Egencia President Rob Greyber told Skift in July 2016. "In [corporate] travel, it's totally fine for you to book something through an online booking tool

SKIFT TAKE

Corporate travel is finally starting to learn lessons from the consumer travel space, mostly because business travelers have been trained by their leisure travel to expect robust booking tools and more control over their trips. The travel management companies that focus the most on improving their traveler-facing technology will win this battle, and improve their clients' travel experience in the process.

at a top one or two travel management company, and then have an agent be totally unaware of that booking. In what world is that totally fine?"

Concur's acquisition of consumer metasearch site Hipmunk was an extremely telling strategic move in this context; as a business travel booking and expense provider, Concur can create a much more user-friendly experience with Hipmunk technology. Business travelers are more likely to use a simple and empowering booking tool than a complicated or limiting option.

American Express Global Business Travel's acquisition of booking technology provider KDS, as well, underscores the importance of technology to the competitive balance in corporate travel.

Expect more consolidation and talent acquisition in corporate travel as companies attempt to shore up their technology shortcomings and appeal to the new generation of mobile-connected business travelers.

A look at business travel behavior shows why technology tools have become an important factor for travel managers. Data from MMGY Global



MOST BUSINESS TRAVELERS BOOK TRAVEL THEMSELVES

Person Responsible for Travel Planning	Total %	Millennials %	Xers %	Boomers %
I make my own reservations	69	69	69	67
The company travel department	17	17	17	18
My assistant/ someone else in the company	10	11	11	9
Travel agent	3	2	3	5
None of the above	1	0	0	2

Most business travelers reported booking their own travel, with less than 10 percent of each age group using travel agents.

Source: Portrait of Business Travelers from MMGY Global

GLOBAL YEAR OVER YEAR PERCENTAGE GROWTH IN AIRBNB USAGE

	Spend	Expenses	Users
2014-2015 Q3	110	101	98
2014-2015 Q4	74	71	77
2015-2016 Q1	51	69	63
2015-2016 Q2	42	50	44

Most business travelers reported booking their own travel, with less than 10 percent of each age group using travel agents.

Source: Portrait of Business Travelers from MMGY Global


show that 69 percent of the business travelers they polled book their own travel. This means that less than one-third of business travelers today book a trip using call centers, travel agents, or a dedicated corporate travel department. It's hard to make sure your travelers are booking in policy when you have no idea what they're doing, so online and mobile booking tools are essential.

For travel providers themselves, particularly ascendant sharing economy services, getting integrated into corporate travel management tools is the next step in moving business travel toward the mainstream.

Airbnb, Uber, Lyft, and others have all invested in creating business travel programs with enhanced tracking tools and data connectivity with existing corporate booking tools.

"One thing that I'm excited about is we have a vision of transportation that is delivered as a service, so one of the critical underpinnings of that is our tech platform being developed to be really accessible for a variety of different use cases," Lyft Chief Business Officer David Baga told Skift.

Better technology will also ease airline ancillaries into the corporate travel mainstream, which will be a boon for airlines and flyers alike; imagine if your corporate travel management tool could allow you to pre-purchase the policy-approved amenities you want ahead of time, greatly reducing tension related to expenses.

The future of corporate travel may finally have arrived. 

**EXPECT MORE
CONSOLIDATION AND
TALENT ACQUISITION
IN CORPORATE TRAVEL
AS COMPANIES
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THEIR TECHNOLOGY
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NEW GENERATION OF
MOBILE-CONNECTED
BUSINESS TRAVELERS.**



DISTRIBUTION WARS HAVE MOVED BEYOND BLACK AND WHITE

By Deanna Ting and Dennis Schaal

In 2016 Hilton Worldwide and Marriott International launched their “stop clicking around” and “it pays to book direct” marketing campaigns respectively. That was the largest-ever campaign launched by Hilton in its 97-year history. Marriott’s videos soared to seven million views on YouTube. The skirmish between the online travel agencies will evolve further in 2017, with each side vying for advantage.

Both parties know they need each other; the issue is under what economic terms and to what degree. Online travel agencies like Expedia especially, and Booking.com, need the big chains’ lowest rates so the online travel agencies can offer their customers the greatest array of choices. If the big chains are missing on the online travel agencies’ sites, and are increasingly replaced by independents and smaller group hotels, then the online travel agencies can take advantage of higher commissions for awhile, but their customers won’t be able to adequately comparison shop and would come to realize that the online travel agencies’ sites are not the place to get a full view of the market.

The hotel chains need the online travel agencies too, but they want to reduce their dependence and get better terms. The chains will increasingly

SKIFT TAKE

Hotel chains have been successful in driving more direct traffic and taking brand share away from the online travel agencies, but 2017 will say a lot about whether their strategies are sustainable. Will lower rates for loyalty program members impact profits? And how can the chains compete long-term with online travel agencies when the latter have much deeper marketing pockets?

drive direct traffic but they need the online travel agencies to attract a subset of consumers who are focused on price — not loyalty — and who wouldn’t normally book direct on a chain website.

There will be a reckoning in 2017. Hotel chains will get a better understanding of whether the loyalty program rates that they are exclusively offering on their websites are coming at too steep a cost in terms of their impact on bottom lines. And the online travel agencies will decide if they’ll have to up their game of hardball and live with protracted direct campaigns from the chains.

Already there are signs of, well, accommodation and an evolution of the online travel agency/hotel chain relationship. Red Lion Hotels, a relatively smaller chain, decided to team up with Expedia, allowing the online booking site to auto-enroll customers into Red Lion’s loyalty program when they book a Red Lion property on Expedia. In addition, Marriott, which has been relatively aggressive in its book-direct campaign, partnered with Expedia, having it power vacation packages on the Vacations by Marriott site.

The point is, online travel agencies and hotels may be eternal frenemies, but at this juncture



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they need each other too. The question is whether hotels will be able to tip the balance of power in their direction, and for the time being, at least, it appears as though they are succeeding.

For example, Hilton Worldwide CEO Christopher Nassetta said during the company's third quarter earnings call October 26 that online direct channels for the chain now command a record 28 percent of its distribution mix, and that Hilton HHonors enrollment jumped 60 percent through the first nine months of 2016.

It's tough to quantify the overall impact, but Nassetta said that revenue per available room has not been adversely impacted by the direct booking campaigns. Although Expedia's efforts to push down Hilton listings in the sort order and other measures have had an impact, Nassetta said Hilton is "better off across the board" because the channel mix is tilting toward Hilton's lower-cost distribution channels.

And if there are threats to the hospitality industry and the online travel agencies, for that matter, they may go by two names — Airbnb and Google. Airbnb is already stepping outside hospitality with its Magical Trips and we expect to see other such moves. At this year's Skift Global Forum, Google VP of Engineering Oliver Heckmann insisted that Google's role in the travel space was one of connector rather than booker, but Google already has the ability to function like an online travel agency. After all, Google has already started booking some hotels and flights, and is serious about voice-based travel booking "assistance."

To succeed and remain competitive, it behooves both hotels and online travel agencies to analyze their collective strengths and weaknesses when it comes to Airbnb and Google. Both Expedia with HomeAway and Booking.com, with its huge roster of vacation rentals and apartments, are taking active steps to provide an answer to Airbnb. Hotels, with the exception of AccorHotels, which acquired Onefinestay and invested in other sharing economy sites, have been slower to respond and may have more at stake. ■

THE POINT IS, ONLINE TRAVEL AGENCIES AND HOTELS MAY BE ETERNAL FRENEMIES, BUT AT THIS JUNCTURE THEY NEED EACH OTHER TOO.

LOW-COST CARRIERS REINVENT THE TRANSATLANTIC MARKET

By Brian Sumers

Conventional wisdom suggested it couldn't be done.

Yes, for decades, low-cost operators have disrupted the airline industry, attracting customers with low prices and few frills. For years, established carriers failed to respond to threats posed by airlines like Southwest, EasyJet, and Ryanair. But even after realizing what the upstarts could accomplish — Ryanair is now the largest airline in Europe — many airline executives figured it was an isolated success. Low-cost airlines, they said, would thrive only on short routes. Passengers wouldn't want to fly them across oceans.

But a few innovative airline executives aren't buying that argument. They think discounters can thrive by using the same strategies as short-haul operators. And while this isn't new — several low-cost airlines already fly overseas — 2017 should be an important year to determine whether this approach will succeed on a major scale.

One airline to watch is Iceland's Wow Air, a bare-bones carrier that started flying to the U.S. last year, making a splash with \$99 one-way fares to Europe, with a stop in Reykjavik. Still, with only a dozen aircraft, Wow Air may remain a niche player for the short-term.

Another is AirAsia X, the most mature of the current batch of long-haul, low-cost carriers. Executives from the nine-year-old carrier have suggested

SKIFT TAKE

Airlines in Europe and the U.S. may have underestimated the threat posed by short-haul, low-cost operators. There's not much they can do about that anymore. But as more low-cost airlines look to add long-haul flights, expect legacy carriers to respond aggressively.

recently the airline might soon return to Western Europe, after pulling out of the continent in 2012.

But the long-haul, lost-cost airline most poised for a big 2017 is Norwegian Air, the European carrier that has for three years flown Boeing 787s from major European cities to larger U.S. markets. The 787 is a sexy plane, though it's not what makes Norwegian the most interesting story of 2017.

What's better is the Boeing 737 Max, a new single-aisle aircraft with updated technology and improved fuel efficiency. Low-cost airlines have long loved the 737's operating economics, but until this 2017 update, the aircraft has not been able to fly longer than about six hours with a full payload.

Boeing will deliver its first Max in 2017. Norwegian has committed to 100, with its first coming in June, and six set to arrive by year-end. Because of the new plane, smaller east coast U.S. cities that could never dream of a nonstop route to Europe will be in the mix for new service.

"The Max has the range to go cross the Atlantic," Norwegian CEO Bjorn Kjos told Skift recently. "But you shouldn't go transatlantic with a Max into JFK in New York. You should do it from secondary airports in Europe to secondary airports in the U.S."

Per seat, Kjos said, the Max is cheaper to operate than the Dreamliner. That could translate into





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shockingly low prices, including, the airline has said, \$69 one-way fares between the U.S. and Europe. That's less than the airline is charging for its 787 flights, and it's a steal even when including ancillary fees.

Of course, legacy airlines have learned lessons from the past, and many want to thwart Norwegian before it gets too big, and before other airlines — such as, perhaps, Ryanair — decide to copy Norwegian.

Air Canada and Lufthansa are building long-haul, low-cost subsidiaries. These growing sub-brands— Air Canada Rouge and Eurowings — pack in seats, while charging passengers for most extras.

Other airlines have a different approach. British Airways will add more seats to some of its existing Boeing 777s and use them to launch routes from London Gatwick that compete with Norwegian, including a new flight to Oakland.

Willie Walsh, CEO of International Airlines Group, British Airways' parent company, said he takes the Norwegian threat seriously.

"If I go back 10 years ago, the argument then was probably that the maximum range of short-haul, low-cost was about four hours," he said. "Beyond four hours, it wouldn't work because customers wouldn't accept the idea that you had to pay for water, pay for a drink, pay to check in a bag, pay for a meal. Norwegian has clearly demonstrated that the consumer is happy to do that."

U.S. airlines have announced few details on how they might respond to Norwegian's moves. But recently, Delta president Glen Hauenstein said his airline may tweak its products to make them more closely match Norwegian's.

"I think we have to look at our entire service offering and ensure that we're supplying what the market wants to buy," he said. ■

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FRAUD IN TRAVEL THE DARK WEB

WHAT IS CYBER FRAUD?

Cyber fraud is essentially fraud committed over digital channels.

CLEAN WEB

All the web that is indexed, in other words, it is made up of all the websites one can find through a search engine like Google or Yahoo.

5%

DEEP WEB

Contains all websites that are not indexed by search engines. Typically everything behind an authentication form is considered deep web.

90%

DARK WEB

Only accessible through specific software, it offers users a way of browsing the normal web anonymously as well as the possibility to host anonymous websites which are only accessible through an obscure url.

5%

HOW THE DARK WEB WORKS:



CYBER FRAUD IN TRAVEL

WHY TRAVEL IS A HIGHLY TARGETED INDUSTRY

Unlike traditional "skimmers," which copy a credit card's data, travel companies often also hold onto the full name and address linked to the card, which makes them much more valuable on the black market. Though this data should be encrypted and managed with high security, recent events show otherwise.

HOW IT HAPPENS

REASONS BEHIND DATA BREACHES

- Poor security on supplier side
- Poor security on consumer side
- Lack of training
- Technological malfunctions



TYPES OF TRAVEL FRAUD PRODUCTS ON DARK NET MARKETS

- Airline Miles and Tickets
- Accommodation
- Ground Transportation
- In-Destination Activities

EXAMPLES OF CRYPTOCURRENCIES



Bitcoin

New cryptocurrencies better cater to total anonymity, but Bitcoin is still the most stable cryptocurrency.



Monero

Provides a higher degree of privacy and anonymity compared to Bitcoin.



CASH

Built upon Bitcoin's core code, it sets out to provide users with the utmost degree of anonymity achievable.



PREVENTION MEASURES



OVERALL AWARENESS

An understanding of security and the sensitivity of data from all employees in a company can help mitigate damages.



2FA

Provides a high level of security at a very low cost. It should be obligatory, particularly when accessing company data from outside of the workplace.



EXPERT CONSULTING

Being advised regularly by experts can help give the company insight into what cyber criminals are currently targeting.



TOURS AND ACTIVITIES ARE FINALLY COMING INTO THEIR OWN

By Dennis Schaal

SKIFT TAKE

Airbnb's entry into the tours and activities market certainly brings the sector to the fore. If Airbnb sticks with a strategy to curate its tours and activities, going with unique and off-the-beaten-path experiences, then that is still important for the sector given Airbnb's scale, but self-limiting. Competition is certainly a healthy thing and all the players will have to up their games.

Big travel brands, including TripAdvisor, Airbnb, Google, Expedia, and to a lesser extent, Booking.com, are finally embracing online bookable tours and activities, signalling that the sector is finally becoming a focal point for the largest online travel companies.

For example, TripAdvisor's non-hotel segment — including vacation rentals, restaurants, and attractions — grew 35 percent in the third quarter of 2016 to \$101 million, while TripAdvisor's hotel segment, which is more than three times the size of non-hotel, slumped 6 percent. As TripAdvisor's Viator unit continues to aggregate what it considers to be the most popular tours, the segment clearly shows signs of being on the upswing as a burgeoning trend.

That doesn't mean that the majority of tours and activities will be online bookable anytime soon. TripAdvisor CEO Stephen Kaufer says it takes considerable effort to bring tours and activities online for a variety of reasons, and that's why the company focuses on bringing online what it considers to be the most-wanted attractions.

Kaufer says one big challenge for TripAdvisor — and all the players, too — is serving up the right tour to

the traveler at the right time. The entire industry has a long way to go in figuring out how to serve up relevant content at the appropriate time.

Airbnb's launch of Magical Trips in about a dozen select cities certainly brings tours and activities into broader view. Airbnb is just getting going in the sector, which will be characterized by competing players with different strategies. When TripAdvisor acquired tours and activities provider Viator in 2014, Viator's strategy was to curate the best tours in popular destinations. But under TripAdvisor, Viator changed its strategy to try to aggregate as many attractions as possible, and that strategy switch has spearheaded growth. Airbnb, on the other hand, states that it will curate its tours, aiming for unique and memorable experiences. That strategy would seem to limit Airbnb's tour horizons, although, as with Viator, strategies do pivot.

Google's Trips app and Airbnb's product launch highlighted how tours and activities on mobile have arrived. Google's Trips app, while not providing any booking capabilities at launch, suggests in-destination itineraries and increasingly makes recommendations contextually by time of day or season. Gogobot, which now calls itself Trip.com, leads the way as well, and uses artificial intelligence

to make tour suggestions based on the weather, time of day, and personal preferences, for example.

As a group, some of the back-end technology players, which provide connectivity, data, and analytics tools to operators, appear to be making strides in picking up customers and bringing them online. These tech providers, some of which offer direct-to-consumer sites as well like Peek, are now helping tours and activities operators professionalize their ranks.

In addition to offering them the capability to run sophisticated revenue reports, automated email services, and manage at least a portion of the business through mobile apps, these back-end tech providers enable operators to more efficiently allocate equipment and seats at the time of booking, with the aim to limit overbookings and cancellations.

Mobile innovation in tours and activities is just now picking up speed. Consumers can increasingly book online in advance, and some companies, like the old-school player Trafalgar, have added an attractive human element, allowing participants to journal and share photos on their app.

But consumers want even more than that. They want their tours and activities on-demand. In the age of instant service from Uber, Seamless, and HotelTonight, people have less and less patience. If they can't book it easily right now, while they're in the mood, they might not book it at all. ■

KAUFER SAYS ONE BIG CHALLENGE FOR TRIPADVISOR — AND ALL THE PLAYERS, TOO — IS SERVING UP THE RIGHT TOUR TO THE TRAVELER AT THE RIGHT TIME. THE ENTIRE INDUSTRY HAS A LONG WAY TO GO IN FIGURING OUT HOW TO SERVE UP RELEVANT CONTENT AT THE APPROPRIATE TIME.



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CRUISE LINES PLAY THE LONG GAME WITH NEW MARKETS AND NEW AUDIENCES

By Hannah Sampson

SKIFT
TAKE

It takes patience and methodical planning to build a new market — and the cruise industry seems to be settling into China until that's done, with whatever tweaks are necessary along the way.

The giddy days of unbridled optimism for the cruise industry in China were gone by 2016, and executives came to grips with the fact that even a market with huge potential couldn't keep up with massive increases in supply.

"In China, we've been growing at 40 percent and 50 percent growth rates without any difficulty. Those are pretty extraordinary levels," Royal Caribbean Cruises Chairman and CEO Richard Fain said. "But this year, we as an industry have pushed those figures into triple digits. Even China has trouble growing at that pace."

So 2017 becomes the year when slow growth is met with relief in a region that many insiders expect to one day become the world's largest cruise market.

Make no mistake: More ships designed for local passengers will parade into China with careful attention paid to shops, restaurants, public spaces, and crew. Norwegian Cruise Line and Princess Cruises both plan to introduce new ships in 2017. It will be Norwegian's first entry into the market.

But some of the fervor of recent years has been cooling. Two cruise lines that were planning to send ships in 2017 — AIDA and Carnival Cruise Line — are

holding off. Another with a large presence in the country, Royal Caribbean International, is selling an older vessel that sails there, although its CEO said the ship would have been sold no matter where it was based.

Investment research firm Morningstar said in a recent report that analysts expect growth to be "lumpy rather than linear" in part due to the way cruises are sold in China. Cruise lines typically charter large chunks of staterooms to distributors, who then sell them to consumers.

Christine Duffy, president of Carnival Cruise Line, said she still sees a place in China for her brand, which characterizes itself as "America's cruise line." Plans for the brand to enter the market in 2018 have also been put on hold; for now, the company expects to deploy a ship in 2019.

"We need the distribution system to catch up with the capacity that is coming into China," she said. "We believe that Chinese consumers, especially a lot of the families, will really enjoy the brand. So I do envision that Carnival Cruise Line as a brand will be in China. We'll just see when makes the most sense."

Even as North American companies line up to bring ships in, they are aligning with state entities to build the industry from the ground up. Carnival Corp. announced in late 2016 that its joint venture with the China State Shipbuilding Corp. and China Investment Capital Corp. had signed an agreement to order two new ships built in Shanghai with the option to order two more. The first would arrive in 2022 — at a time when the industry expects many more people to be sailing.

By 2020, according to the Morningstar forecast, the number of cruise passengers in China may reach 4.3 million, up from roughly a million in 2015. The report said China could produce 7.3 million cruisers by 2025.

"China remains the most robust opportunity for the three major cruise operators, and the companies have moved into the region more meaningfully over the last three years to build brand awareness and cater to the expanding middle class," the report said. ■



THIS IS THE YEAR OF THE MODERN FEMALE TRAVELER

By Sarah Enelow

SKIFT TAKE

The way the travel industry speaks to women is about to change. Pink-tinted products make it obvious that a company is targeting women, but these tokens don't significantly improve the travel experience. Female leadership in travel companies is the next, deeper level of serving female travelers.

In terms of speaking to women, many brands now realize that leaving orchids and chocolates in a perfumed hotel room won't cut it anymore.

The fact that women travel, solo or otherwise, is old news. The bestselling memoir *Eat, Pray, Love* — about Elizabeth Gilbert's post-divorce, round-the-world romp to find herself — was published a decade ago. Travel blogs that run on generic girl power are a dime a dozen, especially if they're written by white women. It's standard practice for tour companies to have a women-only option and plenty of hotels have rooms designed specially for women.

Marketers know well that women influence 85 percent of all purchasing decisions and account for 58 percent of online sales, as cited in Skift's Trends Report: *The Rise of Female Business Travelers*. According to a study by Mandala Research, on average women take as many leisure trips as men and a comparable number of business trips.

So in this marketplace that feels saturated with token female products designed by male executives, which brands can speak authentically to women?

Perhaps those with a female CEO.

Harvard Business Review studied how a company's diversity drives innovation and frequently leads to financial rewards, suggesting that more female leadership in male-dominated fields like travel could bring such benefits. Now that the U.S. has elected a president who's famous for misogynist comments and allegations of sexual assault, female representation may be an increasingly frequent topic of conversation.

Niki Leondakis, CEO of Commune Hotels & Resorts, sits on the board of Dress for Success and speaks openly about the need for C-suite diversity. EasyJet CEO Carolyn McCall rejuvenated the low-cost airline, launched it into the FTSE 100, and was the first woman to be voted Britain's Most Admired Leader. Cheryl Rosner — Founder and CEO of Stayful and former president of Hotels.com and Expedia Corporate Travel — leads a majority female staff at Stayful and believes in mentoring other professional women.

Women of color are spearheading new movements as well; The Black Travel Movement is rich in female founders. Among the most prominent are Zim Ugochukwu of Travel Noire and Evita Robinson of Nomadness Travel Tribe, whose membership is at 80 percent female. The American Indian Alaska Native Tourism Association, which recently made an unprecedented push for inbound tourism to Indian Country, has a female director and an all-female staff.

These women engage in gender-inclusive thinking that many male CEOs struggle to replicate. The question now is: Which companies will reap the benefits of adhering to the proven principle that diversity breeds innovation? ■

ARTIFICIAL INTELLIGENCE IN TRAVEL IS FINALLY BECOMING A REALITY

By Greg Oates

SKIFT
TAKE

After years of hype, hospitality and travel companies are now delivering real added value for consumers by integrating artificial intelligence into online search and booking platforms.

There are few things buzzier in travel right now than the rise of artificial intelligence (AI) and human-machine interfaces. Except, in some ways it's not new. Google search culls millions of options every second of every day for people seeking a good hotel or meal. That's possible due to AI, or machine-learning, where Google can not only crunch data at the speed of light, but also "learn" how to deliver more nuanced results.

"AI is simply a group of technologies that will increasingly be used to augment human capabilities, and make us better at the things we do best," wrote Bob Rogers, chief data scientist for analytics and AI solutions at Intel, in CIO, a publication serving chief information officers. "What's more, AI isn't a story set in the distant future. It's here today, and improving our lives in countless ways."

What is new, however, is that all kinds of travel and hospitality brands are now embedding AI tech in their search process, and chat platforms in their online communications, to improve customer service and engagement. The AI wave in travel began in 2016. It will get more mainstream in 2017.

Visit Orlando was one of the first tourism boards to integrate AI into its web and app platforms to answer more complex travel searches for things like the best brunch spots that serve craft beer. The quality of responses to that query between the pre- and post-implementation of AI in summer 2016 were night and day. The web/app AI technology

was developed by Austin-based Wayblazer, which builds AI frameworks for travel companies around IBM Watson technology.

Likewise in 2016, Hilton Worldwide launched its Watson-powered "Connie" robot, and Leading Hotels uses Watson's brain to match specific guest searches with individual hotels. Air Canada and SAS Airlines both use IBM's machine-learning platform for its flight attendants' in-flight iPad app. And the electric, 3D-printed driverless minibus Olli is manned by Watson at the wheel, which is scheduled to start driving city streets in Washington D.C., Miami, and Las Vegas in 2017.

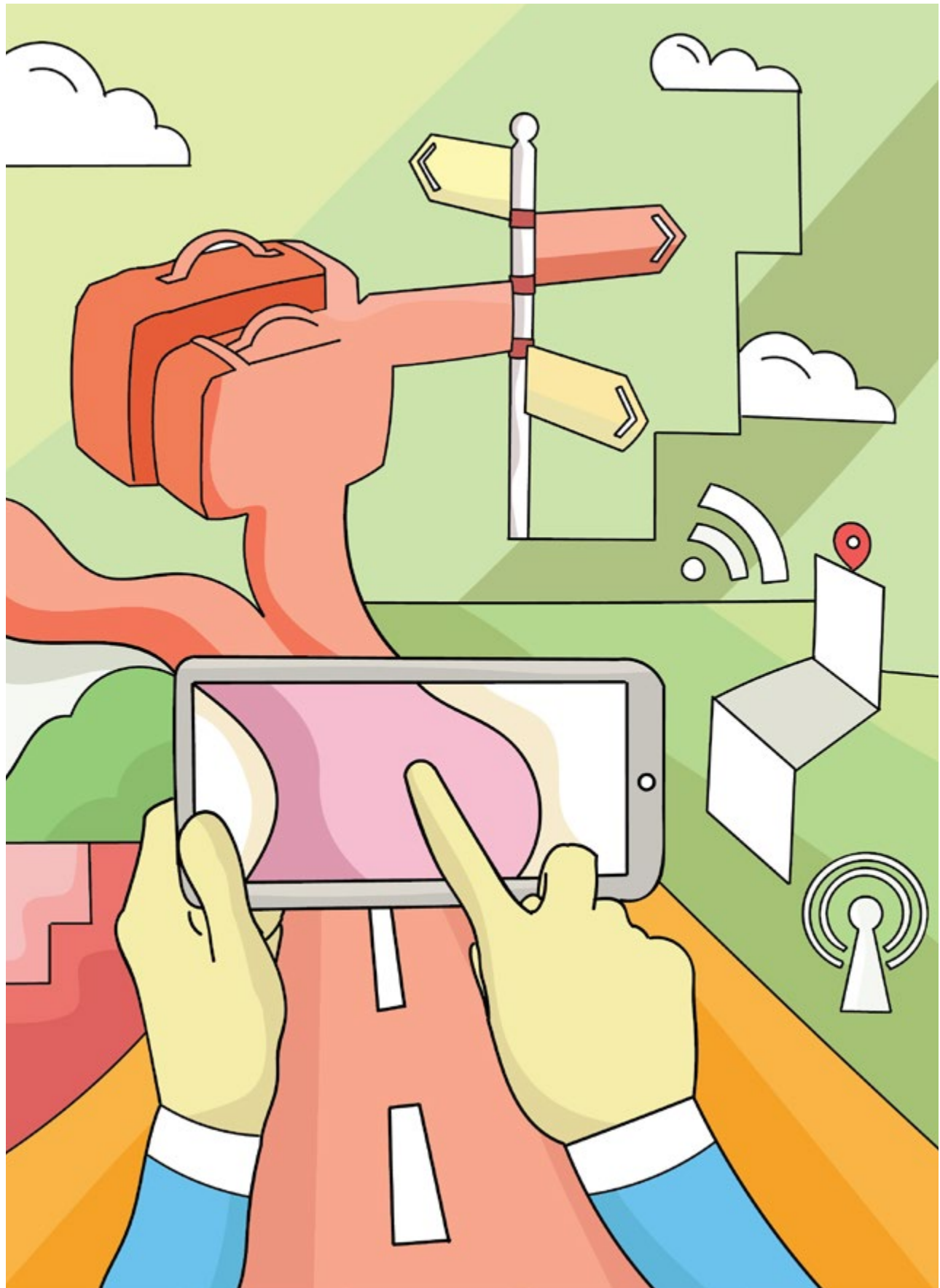
In other recent developments, unrelated to IBM Watson, Kayak co-founder Paul English unveiled the Lola app in 2016, delivering a combination of AI-augmented chat functionality and a live staff of travel agents.

"We're trying to create superhuman travel consultants who are AI-powered and can handle more trips per hour than a regular travel agent can," English told Skift. "They can make dramatically better recommendations than normal travel agents."

AI-powered chatbots are also going mainstream in 2017. Domino's, Pizza Hut, and Taco Bell have already led the way with AI chat to improve customer service efficiency, and provide roadmaps for ambitious travel brands. At the other end of the hospitality scale, luxury brands like Dorchester Hotels and Edwardian Hotels have invested in new AI-embedded customer relationship management systems. Edwardian's virtual concierge "Edward" is described as a "new interactive text response mobile SMS service" to help guests request basic hotel amenities.

Meanwhile, Facebook is developing its in-house "DeepText" AI engine in an attempt to compete with Google's dominance in travel search. Also, Booking.com launched its new AI-powered Booking Experiences pilot platform in 2016 in select cities, so travelers can now search more intelligently for bookable tours and activities within the Booking.com app.

There's still a long way to go before AI and human-machine interfaces truly transform travel research and the user experience across a broad spectrum of brands. But we're on our way. ■



DINING OUT IS THE MAIN EVENT

By Kristen Hawley

It is planned for, reserved, scripted. This shift has been happening over time, but has now reached critical mass: dining out is the main event in a night (or day) out.

Restaurants have always been destinations, and as described in our 2016 Megatrend “The Bourdain Effect,” food is a major hook in travel and trip planning. The way we’re eating as a culture has changed, and restaurants have evolved to become destinations in their own right.

Now, though, a restaurant doesn’t have to be a three- (or two- or even one-) star Michelin to become a destination. Local restaurants are embracing this change, creating immersive and curated experiences for patrons rather than simple, expected service. This doesn’t mean complicated strategy or over-the-top themes. Instead, restaurants work hard to create a distinct feel for their specific space and brand. This extends far beyond the big names in big cities or even Noma-like landmarks. It’s places like Orlando’s Cask and Larder, with its pimento cheese and gin and tonic on tap, or Lexington, Kentucky’s Middle Fork Bar and its local bourbon list. Nothing fancy, just unique and satisfying.

Current restaurant design reflects this trend. Restaurants work to create distinctive spaces that not only evoke a custom, “only here” feel, but also create perfect opportunities for image-sharing on social

SKIFT TAKE

The way we dine out has changed — instead of serving just a meal, restaurants have become destinations in their own right. Fueled by the ability to search, sort, discover, and reserve across digital devices, diners can create the ultimate personalized experience any day of the week, and restaurants have evolved to accommodate these cultural changes.

media. This comes in different forms, from quirky menus to unique floor tiles — anything to make a restaurant stand out. In this way, social media has influenced the changing face of restaurants.

The way we plan how and where to dine is changing, too, based on this shift. Thanks to digital technology — mobile devices especially — everyone can access personalized recommendations based on preferences from formality to cuisine, location, or even the volume level inside of a restaurant. Startups such as Resy and Reserve in the restaurant-technology space have evolved into full-fledged businesses that blur the lines between restaurant discovery, reservations, and refining of the consumer dining experience. Multiple reservation apps allow diners to find the exact perfect location for a meal. Digital guides and apps from traditional players like OpenTable and Foursquare and even car-services like Uber create lists of places perfect for every occasion.

And, finally, the way we order is influenced by these shifts. The days of salad-entree-dessert are behind us, as chefs create menus that reflect today’s social nature of dining. Often, that translates to shared plates, ordered in rounds, accompanied by drinks. And, of course, the more Instagrammable the plates, the better. After all, if nobody back home knows you ate there, did you really eat there? ■





THE NEW LUXURY IS DEFINED BY SMALL BRANDS WITH BIG STORIES

By M. Paul Munford

SKIFT TAKE

The new standards of modern luxury are consumer-led rather than brand-driven, and they are steering the direction of high-end hospitality and travel.

You may have noticed, over the last few years, a change in the wind – if not in your own luxury preferences and purchases, then surely with the tenor of a new generation of brands and services that all seem to embody a refreshingly modern take on what qualifies as luxurious.

You may have found yourself quietly questioning whether a mass-produced “luxury” carry-on, for instance, plastered with a monogram motif can qualify as luxurious, simply because of its high price. That’s especially true when you can find a competing product of equal or better quality – and at a better price – from an up-and-coming specialist.

Exclusivity – and delight – are still just as important for the modern luxury experience today as they’ve

ever been. But rather than scarcity being tied up in the cost of an item, or prestige being defined by the logo on the side of someone’s bag, scarcity and prestige are linked to unique and outstanding brand experiences.

The recent release of Snap’s Spectacles is a perfect example. The product rollout is intended to delight and to build excitement. But it also offers up a new way of thinking about exclusivity: exclusivity by geography, rather than financial exclusivity.

Social media-friendly, share-worthy, global: The Spectacles, while not quite a modern luxury item, have certainly adopted modern luxury behaviors. In doing so, they’ve stoked excitement for a product whose prestige is separated solely from price, and whose purchasing experience is exciting (and speaks volumes about the Snap brand going forward). These are talking points the hospitality industry might be wise to pay attention to.

Marked by a dramatic embrace of digital, and the arrival of a new wave of modern luxury brands and services that emphasize delightful experiences – be they in travel or otherwise – we find ourselves at a point on the luxury timeline where choice is now in the hands of the consumer, and smaller brands now have a chance to not only survive, but thrive. Furthermore, they’ve conditioned shoppers and travelers alike (who are often one and the same) to expect certain behaviors from the luxury brands they support and at the properties around the world where they choose to stay. In doing so, these up-and-comers are guiding the direction of the luxury marketplace today.

The longstanding standards of decorum and good taste have been upturned:

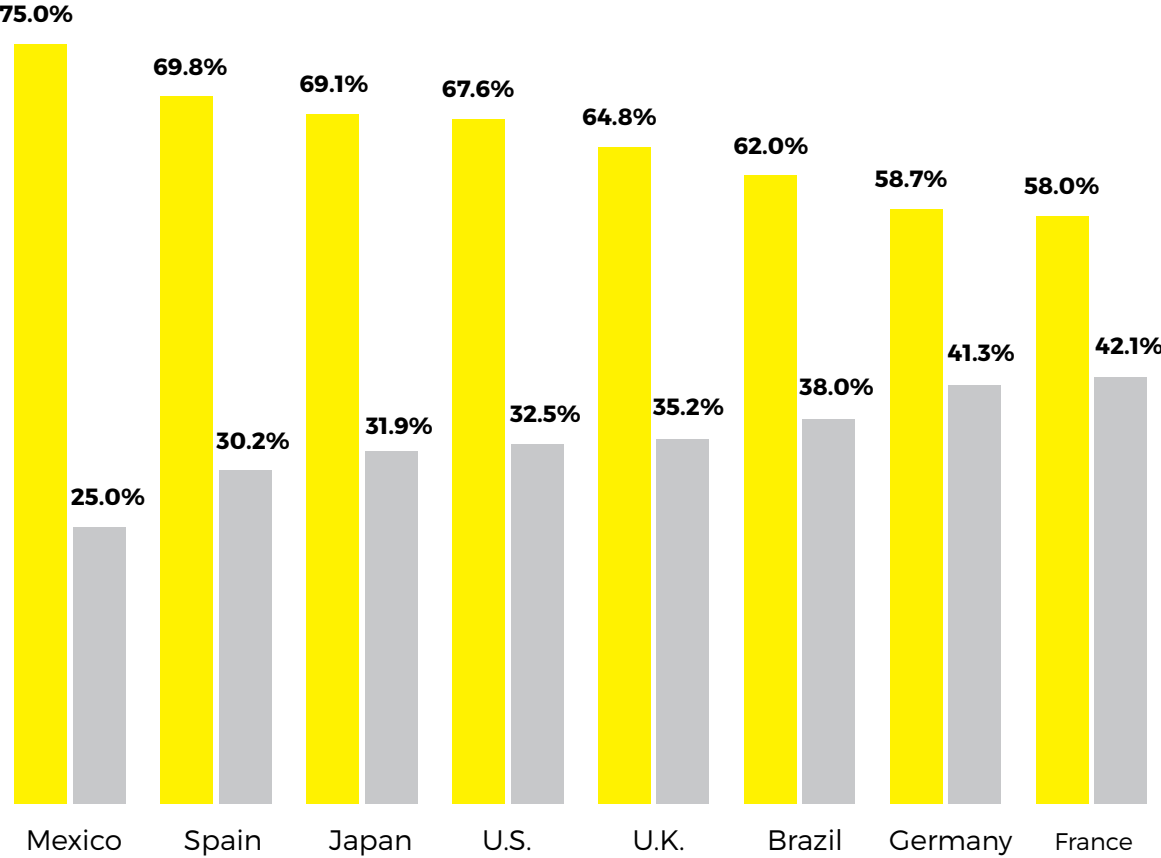
“Opulence,” The Telegraph’s Stephen Bayley recently noted, “is a dated part of any definition of luxury.” Opulence, and opulence alone, doesn’t cut it in today’s competitive marketplace, which is driven by transparency and consumer choice/independence.

In the hospitality industry, we’ve already seen strategies that reflect this new way of luxury thinking from the likes of Conrad Hotels and Waldorf Astoria Hotels. Both have recently introduced new programs (Conrad’s “Smart Luxury” initiative and Waldorf’s “Unforgettable Experiences” program)

EXPERIENCE VS. OBJECTS

Would you rather spend your disposable income on a travel experience (a trip abroad or family road trip) or material objects (a new television or clothes)?

A travel experience ■
Material objects ■



This survey was administered to the adult Internet population in Brazil, the UK, Mexico, France, Germany, Japan, Spain, and the U.S., through Google Consumer Surveys. The results are based on the responses of over 9,600 respondents, divided equally among the eight countries.

Source: Skift

intended to offer a more tailored experience for the well-heeled traveler. These programs are ambitious and certainly forward-looking, but they're also both an indirect reaction to the thinking (and threat) of Airbnb as well as more contemporary high-end hostels and hotel chains where buzzwords like "personal," "authentic," and "local" weigh heavily.

This sort of thinking reflects a new philosophy, where consumers aren't limited to the confines of a particular brand, and where companies simply become the catalyst by which they can create their own outcomes. That's one of the reasons why consumers are flocking to products that hide their logos on the inside, thereby allowing shoppers to express their sense of style without it being defined by a particular logo, NPD Group reported. The retail research firm recently reported that a third of all handbag purchases over a 12-month period up to June 2016 were of bags that hid their logos or had none at all. This uptick was consistent across all age groups — both younger buyers and older ones — not just shoppers in their 20s.

As these examples demonstrate, today's concept of luxury, whether for retail or for travel, isn't what it used to be. It's not about conspicuous consumption. It's about the personal journey, the experience, and the story behind it all. And that, in and of itself, presents the hospitality industry with an incredible opportunity to deliver truly bespoke and memorable experiences for today's discerning luxury traveler. Drawing on the expertise of retail innovators, smart luxury hoteliers can enhance the overall guest experience to be more personalized, more transparent, more desirable, and much more innovative than ever before. ■

**WE FIND OURSELVES
AT A POINT ON THE
LUXURY TIMELINE
WHERE CHOICE IS
NOW IN THE HANDS
OF THE CONSUMER,
AND SMALLER BRANDS
NOW HAVE A CHANCE
TO NOT ONLY SURVIVE,
BUT THRIVE.**



SKIFT GLOBAL FORUM

*Insights, takeaways, and highlights
from the 2016 version of our
annual gathering in New York City*



THE FORUM PROMISE

Skift Global Forum is the largest creative business gathering in the global travel industry. Over the last three years it has become what media, speakers, and attendees have called the "TED of travel."

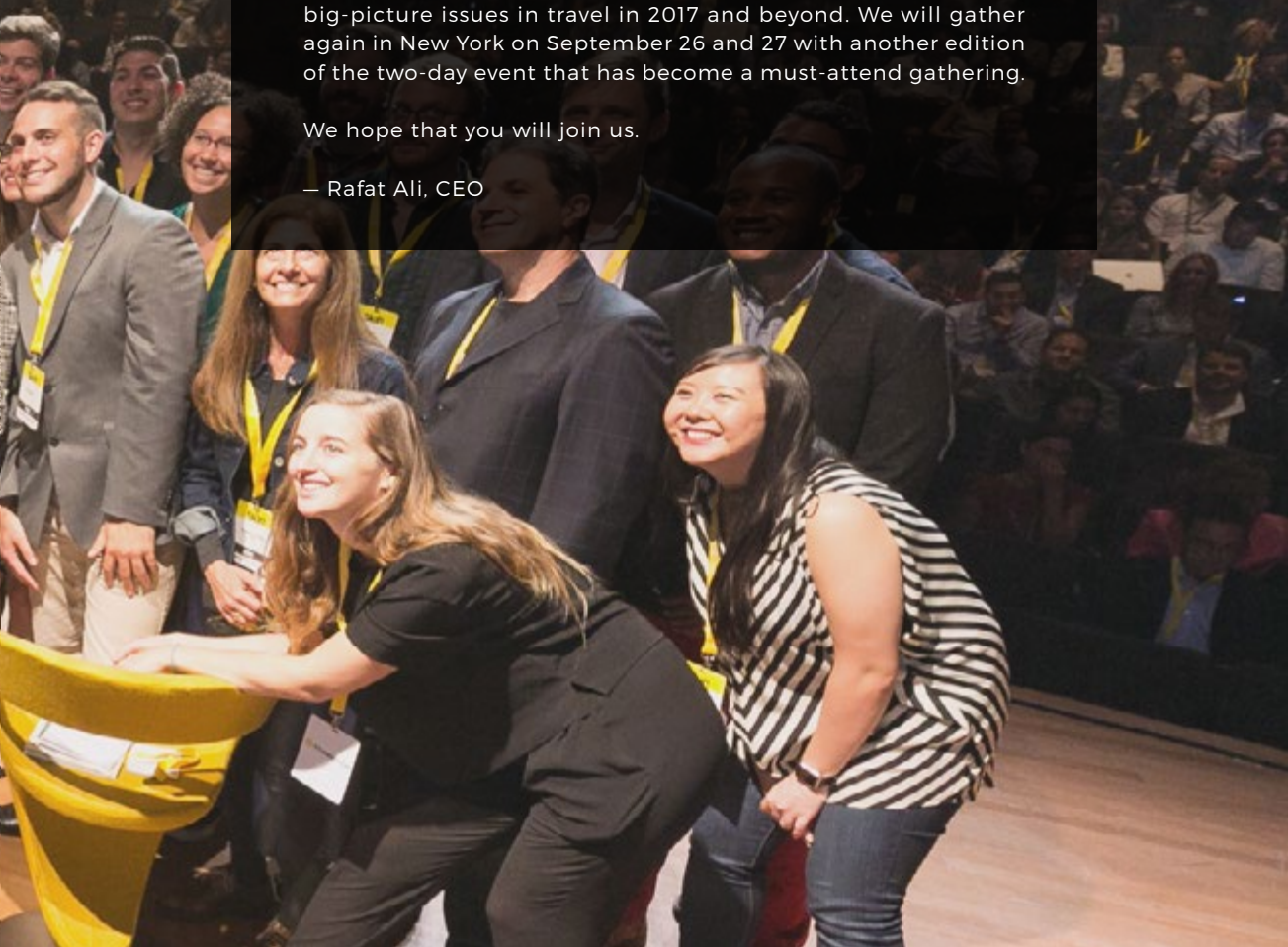
It is the first conference focused on top marketers, strategists, and technologists in travel — the people creating and defining the future of travel. Skift carefully curates topics and speakers in order to inspire the professionals in travel about the business and creative potential of the world's largest industry.

Our Global Forum events — first in New York City and now in London as well — help attending professionals understand the changing trends in travel across sectors, geographies, and the functional silos in the travel industry.

As in New York City, our London event on April 4 will feature the brightest leaders and thinkers in global travel speaking about the big-picture issues in travel in 2017 and beyond. We will gather again in New York on September 26 and 27 with another edition of the two-day event that has become a must-attend gathering.

We hope that you will join us.

— Rafat Ali, CEO





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AND CREATIVE TRAVEL
INDUSTRY GATHERINGS.

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LONDON,

APRIL 4

NEW YORK CITY,

SEPTEMBER 26-27

WHO CAME

63
Speakers

1000+
Attendees

550+
Companies



WHAT HAPPENED

In September, the attendees filled Lincoln Center's Alice Tully Hall to hear from the industry's top CEOs and creative thinkers. The first day's program began with a frank discussion with Arnold Donald, CEO of Carnival Corp. A conversation with current Expedia CEO Dara Khosrowshahi led to a one-of-a-kind panel that included the founders of Priceline and Expedia about the early days of online travel agencies. Marriott CEO Arne Sorenson ended the first day's events with one of his first public conversations following his company's acquisition of Starwood.

Between the two days, attendees filled the public spaces of Lincoln Center for workshops and exclusive evening events with fellow leaders.



WHAT IT'S LIKE TO PARTICIPATE

Skift Global Forum events gather attendees and speakers from across the strategy, marketing, and technology specialties in travel. The days are filled with inspirational and informative talks, punctuated by networking-heavy breaks and lunch-time seminars.

If you're not able to attend, you can watch video highlights in the months that follow and listen to exclusive podcasts, in addition to reading day-of coverage from Skift's team of editors and writers.





Congrats @denschaal @rafat and entire @skift team for grt mind meld on e-commerce and travel. @Rich_Barton @Jay_S_Walker @dkhos @PAReeder



*Brad Gerstner,
Founder and CEO
Altimeter Capital*

@altcap

Super fun panel w/ @dkhos @denschaal and jay walker. Thx @denschaal for going deep. #skiftforum



*Rich Barton,
Founder
Expedia and Zillow*

@Rich_Barton

Half the room concerned about market caps & billions of transactions, other half focused on serving our guests & hospitality. #skiftforum



*John Gunter,
President and CEO
Frontiers North*

@JohnGunter

"You realize how alike we are even though the places we go may be very different. That's travel." Arnold Donald, CEO Carnival #skiftforum



*Heather Wyatt,
VP Communications
National Geographic
Partners*

@WyattTweets

My Twitter "lit up" this week! Thinking @skift had something to do with it.. Yes, just said lit up – really am from the dawn of the Internet!



*Jay Walker,
Founder Priceline
and CEO Upside*

@Jay_S_Walker

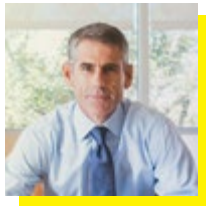
WHAT THE SPEAKERS SAID

Executives and leaders from across the industry, and from influential brands such as Facebook and Google, joined us on stage for panel discussions, one-on-one conversations, and TED-style talks. Here are highlights from what they had to say:



Arne Sorenson,
CEO Marriott

"We've all got to be cautious about making millennials monolithic. They are as different in their points of view from one another as any generation is. I don't think it's anti-corporate. It's anti-phony. You have to be authentic to what you are."



Clayton Reid,
CEO MMGY

"We as marketers are spending more and more money against this monolithic group and I would categorize that in some ways as a rabbit hole, unless you're specifically looking at the behaviors themselves."



Arnold Donald,
CEO Carnival

"The bottom line is that people are seeking their own personal travel experience. The real challenge for us to get each individual the travel experience they're looking for. Even millennials are all not exactly the same."



Aaron Gowell,
CEO SilverRail

"I think our biggest challenge as a society, as a group of people, as a group of entrepreneurs, is to think about this city problem."



Robert Albert,
CEO Routehappy

"Commoditization is a big challenge for airlines. Every day they have to compete on price often to the detriment of their own profitability."



Luke Bujarski,
Research Director Skift

"Even though we're all different — we're all unique in terms of what we want to experience — there's this commonality, this emotional journey that a lot of travel experiences tend to share."



Dara Khosrowshahi,
CEO Expedia

"There is a mischaracterization that this is a[n online booking] war. Every business is trying to optimize for themselves over the long term. We understand when we talk to hotels that there is a conflict of interest – they have to pay our listing fee and a franchise fee."



Paul English,
Founder and CEO Lola

"Innovation happens with small teams. The way little companies like Kayak become big companies is you hire better teams and you out-innovate."



Ben Smith,
*President of Passenger Airlines
Air Canada*

"The customers we have choosing our business class cabin don't like to have surprises. They like to have as much control as they can with their experience, from first point of contact right through to the end."



Inga Hlín Pálsdóttir,
Director Visit Iceland

"I wouldn't say we have a crazy problem at the moment. It's not just about bringing tourists, it's about being sustainable as well. We need to be careful about our lifestyle and sustainability around nature."



Matthias Hühne,
Author and Publisher

"Finding the essence of what a company stands for – or should stand for – and translating this into a corporate design is a highly complex procedure. Successful designs will greatly contribute to a company's perception in a competitive environment."



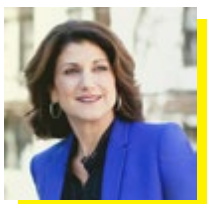
Frits van Paasschen,
Former CEO Starwood

"The reality is that incumbents always underestimate the strength and power of disruptors. In these large organizations, a lot of people have a vested interest in the world staying the way it was."



Brian Kelly,
The Points Guy

"With the points game it is still alive and well but you need to do the math more than ever. But unfortunately most people don't like doing math."



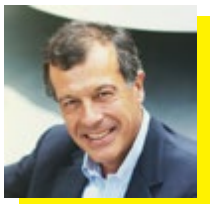
Niki Leondakis,
CEO Two Roads Hospitality

"The basics of hospitality have been compromised to make room for innovation, but the best innovation comes from the inside out."



Ije Nwokorie,
CEO Wolff Olins

"Brands that know how to make their customer the hero really know how to reach out to the world."



Henri Giscard d'Estaing,
CEO Club Med

"People nowadays live in an extremely tense world, and when they are on holiday – especially with their family – they want to have this disconnection, but to reconnect."



Fredrik Korallus,
CEO Generator Hostels

"We've created a much higher-end experience. It's an extreme focus on experience to really accentuate everything that happens during the journey for the guest."



Sarah Personette,
VP of Global Business Marketing Facebook

"Facebook's intention isn't to become a middleman between travel brands and travelers."



Jay Walker,
Founder Priceline and CEO Upside

"If you try to create an innovation that is more than an improvement, something that offers the customer a new value equation, your risk is two to three times higher. But the payoff is 10 to 100 times higher."



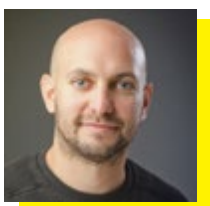
Anand Sanwal,
Co-Founder and CEO CB Insights

"The big challenge for big companies is that they spend inordinate amounts of time worried about basis points amongst their other giant competitors. What they start to miss is startups and other emerging business models. They're not coming for your basis points, they're coming for your commas."



Amar Lalvani,
CEO and Managing Partner The Standard Hotels

"Scarce things are usually hard to do, whether it's a piece of art or whether it's a fabulous hotel. Those things become valuable not because of how fast they grow, or how replicable they are, but how scarce they are, and how much people love them."



Rich Goodstone,
Co-Founder Superfly

"We've been defining culture through the lens of live experiences for 20 years, and we're helping customers tell their story through that culture."



Ruzwana Bashir,
CEO Peek

"Our businesses are running their business on the go. So if you're a tour operator doing ziplining, you can have your waivers signed on an iPhone in the middle of the forest canopy."



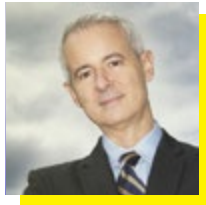
Chip Conley,
Global Head of Hospitality and Strategy Airbnb

"Data scientists represent what revenue managers represented 25 years ago. This is a huge differentiator in the long term: personalization and customization. We need to get really smart around data science. It helps us personalize choices."



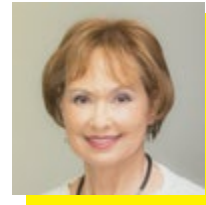
Mike Shea,
*Chief Logistics Officer & Partner
SXSW Conference & Festivals*

"We're transforming a destination and giving people another reason to go there."



George Hobica,
Founder Airfarewatchdog.com

"They're screwing with us and I don't see why I should be loyal."



Meryl Levitz,
CEO Visit Philadelphia

"Hospitality and tourism is a power base that is made up of many powerbases."



Brett Tollman,
CEO The Travel Corporation

"One of the things we see, frankly, is that many people say they want to go and do their own thing. But when you are traveling in a country where there's foreign languages and other issues, sometimes you do kind of want a guiding hand to help you."



James Sanders,
*Principal
James Sanders + Associates*

"You can't really be involved in the world of travel without being really, profoundly interested in places and what they mean."



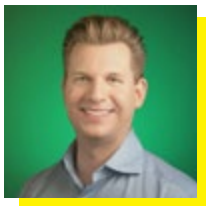
Roger Dow,
*President and CEO
U.S. Travel Association*

"We've become a no-vacation nation. We've become work martyrs, and the rest of the world thinks we're crazy. In 2000, we took 20.3 days of vacation. Last year, as a group, we took 16.2. So we've given back a week and it's a big challenge to productivity, families, and relationships."



Liz Lambert,
Founder and COO Bunkhouse

"With a hotel you can actually curate an experience. Airbnb can't control what every one of their hosts does."



Oliver Heckmann,
VP Engineering Google Travel

"Our master plan is to be the connector that builds awesome travel experiences, qualifies users and then sends them off to the right partners."



Dara Khosrowshahi,
*President & CEO
Expedia, Inc.*

"Where are the softball questions?"

JOIN US

Skift Global Forum: EUROPE

On April 4, 2017 Skift Global Forum: Europe will bring a mix of business, tech, and creative CEOs and leaders who are fanatically focused on the big-picture issues that are defining the future of travel in Europe.

With the Brexit process starting and the rise of isolationism in key parts of Europe, the importance of travel to the most-visited continent becomes even more urgent. We will explore these and more issues in our inaugural one-day European gathering at Tobacco Dock, London.

Speakers include:

- Richard Solomons, CEO InterContinental Hotels Group
 - Bjorn Kjos, CEO Norwegian Air
 - Hugo Burge, CEO Momondo Group
 - Daniel Houghton, CEO Lonely Planet
 - Gareth Williams, CEO Skyscanner
 - David Scowsill, CEO WTTC
 - Claus Sendlinger, CEO Design Hotels
 - James & Tamara Lohan, Co-Founders Mr & Mrs Smith
- And more

Visit forum.skift.com/london to learn more

Skift Global Forum:

NEW
YORK
CITY

Our flagship gathering will return to NYC September 26–27, 2017 and will bring the same intensity and inspiration as our past two events have. Over 1000 attendees and 50+ speakers will come together to define 2017's travel trends and decipher how the changing world is affecting the globe's largest industry and vice versa.

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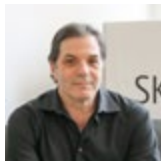
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Founder & CEO



Jason Clampet
Co-Founder &
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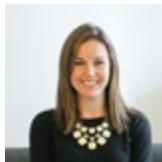
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Anthony Derico
VP of Ad Sales



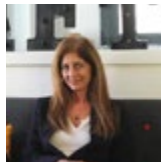
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Enterprise Sales



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Deborah Knudsen
Executive Director, Sales



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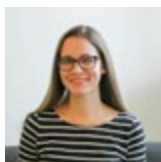
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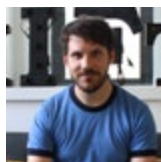
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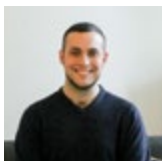
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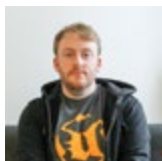
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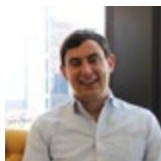
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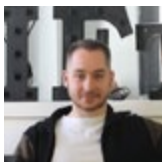
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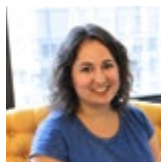
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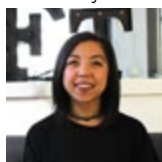
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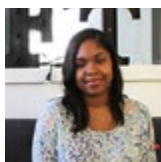
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Kirstie Jiongco
Project Manager



**Syia
Lewis-Doryumu**
Director of Strategic
Operations



Melissa Jimenez
Conference &
Events Planner

**“ THERE’S ALWAYS A STORY.
IT’S ALL STORIES, REALLY.
THE SUN COMING UP
EVERY DAY IS A STORY.
EVERYTHING’S GOT
A STORY IN IT.
CHANGE THE STORY,
CHANGE THE WORLD. ”**

— TERRY PRATCHETT, A HAT FULL OF SKY

Skift.