

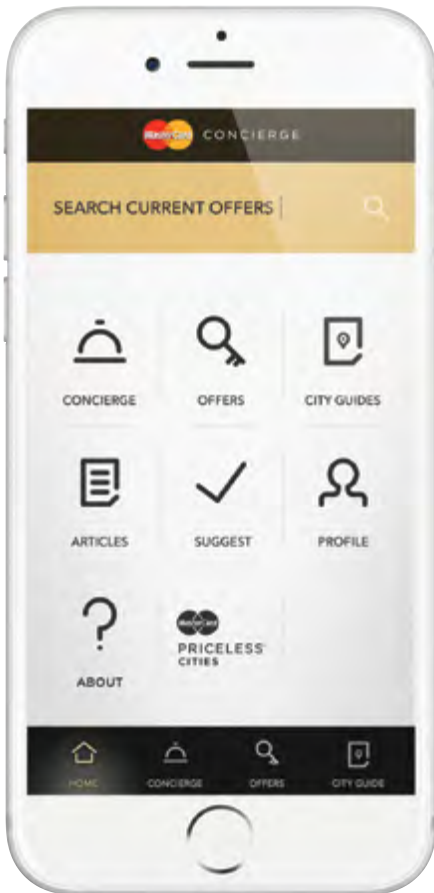
SKIFT

THE VERSUS ISSUE

THE FAULT LINES OF DISRUPTION IN THE GLOBAL TRAVEL INDUSTRY



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LETTER FROM SKIFT CEO

In your hands is the second issue of the Skift Magazine. Away from our usual timely coverage of the business of travel, we are taking a step back with this package, looking at what we are calling **The Fault Lines of Disruption** in the global travel industry.

These fault lines manifest themselves in the form of old versus new, consumer versus business, east versus west, left versus right, and many other such clashes. We aim to decipher these clashes with this package, which also serves as a stage setting for the Skift Global Forum 2015, our flagship conference defining the future of travel on October 14-15 in New York City.

The core of the magazine is a package of stories and essays called "Versus" where we juxtapose some of these central conflicts to consider. We don't aim to be judges on which of these clashes happening will win out, or which of them are good versus bad, but that the opportunities for disruption in the industry lie in understanding and capitalizing on these clashes. The answer, in some cases, will be completely new industries that have the best mix of old and new.

The new reality in the travel industry could very well be the constant emergence of new faultlines as old ones settle, as we see in other big global sectors like technology, media, and finance.

As we have always maintained here at Skift, there are few ways to future-proof yourself against being consumed by these fault lines:

Marketing/Tech/User Experience/
Design: As long as you are in

the cross hairs of these four pillars, you have future-proofed yourself.

Don't get swept up in the headlines all around you, build around larger trendlines emerging.

Be fanatically focused on the changing consumer behavior.

“

THE GREATEST DANGER IN TIMES OF TURBULENCE IS NOT THE TURBULENCE; IT IS TO ACT WITH YESTERDAY'S LOGIC.

”

— PETER DRUCKER.

Happy Skifting!

Rafat Ali
Founder & CEO, Skift.



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HERE IS A PRESCRIPTIVE LIST OF 30 DIFFERENT FAULT LINES

We here at Skift are watching, and we have addressed some of these in the pages ahead.

- + Customer Service vs. Customer Experience
- + Alternative Accommodations vs. Traditional Lodging
- + Car Hailing vs. Car Rentals
- + Packaged vs. Unbundled Travel
- + Low-Cost Airlines vs. Full-Service Airlines
- + Corporate Travel vs. Business Traveler
- + Hate Selling vs. Love Selling
- + Cruise Industry vs. Non-Cruisers
- + Cities for Locals vs. Cities For Tourists
- + Pervasive Connectivity vs. Mindfulness
- + Advance Planning vs. Last Minute Booking
- + Design vs. User Experience In All Phases of Travel
- + Millennials vs. Post-Millennials (Generation Z)
- + Crumbling Americans Airports vs. Traveler Demands
- + China vs. Rest of the World
- + Sustainable Travel vs Consumer Apathy
- + Global Seamless Mobility vs. Visa Regimes Built For Security
- + Closed Mobile Apps vs. Embedded Mobile Services
- + Search Box vs. Messaging For Consumer Queries
- + South & Southeast Asia vs South America vs Africa
- + Growth of Travel Globally vs. Vacationless Americans
- + Iconic Destinations vs. Young Experiential Travelers
- + Fragmentation in Tours & Activities vs. Aggregation Platforms
- + Conversion Marketing vs. Brand Building
- + Geopolitical Upheavals vs. Billion Plus Travelers
- + Travel Startups vs. Repeat Usage By Travelers
- + Loyalty Programs vs. Brand Fanatics
- + English Language vs Global Languages Reaching Travel Customers
- + Non Diverse Travel Executives vs. Global Diversity of Travelers
- + Direct Booking vs Online Booking Sites (OTAs)
- + Priceline/Expedia vs. ??

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FIRST GLANCE



HOW TO SOLVE HATE SELLING

BY **Jason Clampet**

Travel's unique relationship with hate-selling — a combination of high-pressure sales and fear of missing out — puts travelers on the defensive when they're just about to make a big purchase.

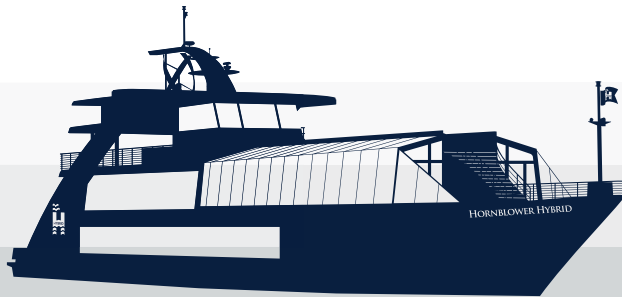
Hate-selling is a symptom of the industry's ongoing conflict between increasing revenues and making travelers happy.

As airlines, hotels, cruise lines, online travel agencies, and others find more and more success

unbundling services and selling them a la carte, consumers are faced with a constant upsell on horrendously designed car rental booking sites, over-aggressive airline sites promising humane treatment for just a few more dollars, hotels asking for



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UPCOMING HOLIDAY CRUISES: Check website for details and up-to-date pricing.

FIRST GLANCE

a few extra dollars to promise non-smoking rooms, and “buy-now-or-else” false-sense-of-urgency prompts on online booking sites.

Fees aren't always bad, but the combination of FOMO and constant begging for money leaves a bad taste with customers. This is what happens when you let conversion marketers run amok with customer experience. They made it a science, but forgot about being human.

Here's are four ways the industry and consumers can better get along:

Don't make the cheap option feel like a penalty: Delta and JetBlue's approaches are excellent examples of the contrasting approaches. The former uses pop-ups on its website to warn consumers that the cheap fare they are buying is a really, really bad idea. Instead of a list of what you get with the fare, the focus is on what

TALKING HEADS

This spring Skift began recording the Skift Podcast from our New York office. We've welcomed a broad range of guests who have shared insight on subjects as diverse as tourism through gastronomic hubs, to mobile room check-in, to building smart tourism business, to the role of fashion in luggage. Below are quotes from our guests.

New podcasts can be found at podcasts.skift.com

+ “Now is the easiest time that there ever has been to start a small business.”
-Nick Gray, founder of MuseumHack





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FIRST GLANCE

you don't get. Over at JetBlue, its new fare classes read more like a feature list for an iPhone, going from a base model to one that's fully tricked out. Sure, the cheap option doesn't have all the bells and whistles of the pricey one, but you're not left worrying you just doomed your family to a terrible trip because you didn't pony up \$20 for a seat reservation.

Talk like a human: The cost of car rentals can be quite confusing: local taxes and fees associated with airport versus city pickup, mileage fees, car classes, and other differentiating factors aren't easy to explain. So don't. Renters don't need to know the precise breakdown of every single item, they just need to know what they're going to pay at the end of the day. If you show \$23 a day for a Hyundai on page one and present them with \$62.50 at the end of the process, the renter doesn't feel more knowledgeable about rental car pricing and policies, they feel like they just got swindled.

Think mobile all the time: Uber has managed to combine very complicated fleet tracking, on-demand car hailing, user reviews, GPS, mapping, instant

messaging, and payments in a few flicks of the finger. They even made surge pricing painless to accept (the pain comes later). They can do this because they only have one consumer use case, and it's mobile. Travel brands need to narrow their use cases to what power users want, and give the fringe cases other ways to book that don't interfere with the other 95% of users that just want a room, flight, ride, or ticket.

For every fee you add, add a perk or freebie: Are you a hotel manager charging a dreaded resort fee? Then drop the Wi-Fi charges, deliver free bottles of sparkling or flat water to guests' rooms, and ban tips to service staff. Travelers don't always hate fees, they just hate being nickel and dimed.

Don't be punitive: Southwest Airlines has a few fees, but it doesn't screw over passengers when it comes to changing flights or checking a bag. It stands in stark contrast to United, which charges for everything, and then charges more when things go wrong. ●

Jason Clampet is Skift's Co-Founder and Head of Content.

+ "With the change to all the carry ons, small body bags are very popular now for travelers. Everyone needs everything right at their side."

— **Brad John**,
co-founder of travel retailer Flight 001

+ "[The Travel Channel] in the past year has made a big effort to create shoulder content to our linear shows that can go into the social platforms and get passed around. In the past six months we have gained half a million followers by doing that, so it is really important, and certainly to reach the younger viewers you have to be in that game."

— **Ross Babbitt**,
SVP Programming at Travel Channel

+ "Fewer and fewer [millennials] are choosing to drive as a way to get around. More of them are embracing public transit, biking and walking, and they really want this flexibility. People are choosing a better experience. It is a way they are taking control of their own transportation destiny in a way."

— **Dani Simmons**, director of communications and government affairs at Motivate

+ "You have to be able to sell a story, not just tell a story, and you have to be able to do it in ten different ways in five seconds. We used to talk about the 30-second elevator pitch, and now it's the five second sound bite, the 140 character Tweet."


— **Jennifer Maguire**,
president of Jennifer Maguire Communications

+ "More so now than ever, given the competition, we've got some disruptors in the market to the business and to the culture that are unlike anything we've seen before. The Airbnb's of the world are really starting to change the way we look at the business from a foundational level down to the core: the way we hire and retain people so that we compete not just against our own industry but other businesses that have found more blue ocean out there to explore."

— **Josh Fluhr**,
COO of Morgans Hotel Group

Q & A

HOW HOTELS USE WECHAT TO REACH GUESTS IN ASIA



All social networks are not created equal, and all markets are not the same. Perhaps the best example of this is how hotels in Asia have embraced the chat smartphone application WeChat to communicate with guests and potential guests. Skift's Daniel Peltier spoke with Reto Klauser, VP and General Manager of the Shangri-La Hotel in Singapore, to understand how the property has fit the app into its daily operations.

Q & A

WeChat vs. Facebook

“For a hotel, WeChat is a great platform to engage in conversations with our followers and guests, as well as to run tactical campaigns as it is a direct booking platform that is convenient and relevant to our followers. We use WeChat to share hotel news in very much the same way we use Facebook; however, where Facebook tends to be a purely social space (with users veering away from hard sell offers), WeChat differs slightly as the platform combines both social and commercial functions which allow dining and accommodation bookings to be made. We began to receive booking inquiries soon after our launch.”

Other Ways WeChat is Used

“Some existing guests of our hotel have also turned to this platform to ask for travel and sightseeing guides. We are now using the platform as a guest service as well, and we have ascertained that users find it more personal and convenient to plan for their trip via direct text messaging. Content marketing remains one of our key strategies to engage with followers.”

Marketing on WeChat

“There are few targeting options with marketing on WeChat. It is still a very private channel that has limited options for promoting a brand account. Followers can be targeted based on gender/age/account type and location; however, the location can be inaccurate as it hinges on the account registration and not the physical location of the user.”

“WeChat marketing options such as the ads that are displayed at the bottom of subscription messages (often ignored) or in Moments (a WeChat function to share your thoughts or photos), can be expensive, meaning the ROI tends to be low. What tends to be more effective is to engage with WeChat KOL (Key Opinion Leaders) to act as a brand advocate and to grow your own following in that manner. Promotional WeChat campaigns such as what we ran when we first launched our account can also be very powerful in boosting your following.” ●

Daniel Peltier is a Reporter at Skift.

5 QUOTES ON THE FUTURE OF DIGITAL MEDIA

- + “There’s still a lot of experimentation. Look at what Marriott is doing. They’re playing in every space possible. At the end of the day not everything is going to be productive but they’re trying to see what’s going to work. They’re publishing a magazine, they create feature films, they’re on Snapchat, they’re on Medium, they plan to partner with Reddit. You wonder what’s a hotel company doing on Reddit when they’re not selling hotel rooms, but they want to be part of the conversation.”
— **Veronica Stoddart**, Percepture
- + “The great thing about digital is numbers. We can see what’s performing and what time of year. The numbers don’t lie. If you’re looking at a P&L you’re looking at the numbers, and then it all makes sense.”
— **Arabella Bowen**, VP and editor-in-chief, Fodors
- + “I’m competing with the nightly news and the kids’ soccer game and everything else going on. It’s our challenge to keep a foot in the past to remind people what we’ve always been, but also to remind people to keep stepping forward.”
— **Maggie Zackowitz**, editor-in-chief, National Geographic Traveler
- + “Practically every destination and major brand we work with is now asking for aerial video in the branded content we produce for them.”
— **Ross Borden**, co-founder and CEO of the Matador Network
- + “Potential advertisers or new airline partners ask us, ‘What is the engagement really like? Do people read the magazine given all the other things they could be doing?’ In fact, they do. They go one step further and share what they’re reading.”
— **Michael Keating**, CEO of Ink Global

THE GOLDEN AGE OF **SMARTER** SEATING DESIGN

Anthony Harcup, an associate with Acumen Design Associates in London, worked on Etihad's revolutionary "Reimagined" interiors program as part of the Etihad Design Consortium. He gives Skift Aviation Editor Marisa Garcia his takes on what's right, what's wrong, and what's to come in aircraft cabin design.

Luxury

"In the commercial sector, it's companies like Etihad that own the loyalty of high net worth passengers who are prepared to pay for an exclusive experience, and so that is what Acumen have helped them to accomplish. The difference in approach between top-tier airlines and their lower-end competitors is the 'Hospitality' experience versus the 'Transport' experience. Hospitality is one of the key signature elements of the 'golden age'?"

The Golden Age

"It's interesting to look back at what is now referred to as the 'golden age of air travel'

when getting on an aircraft to travel overseas was once a privilege of just a handful of fairly wealthy individuals. The relative expense of an airline ticket in 1960 which delivered a memorable and hospitable experience would likely be comparable to a business class or first class ticket in today's money—however, back then, there was no low-cost comparison to benchmark against. The divide in offer is more clearly illustrated to today's economy passengers by the on-board juxtaposition of the flat-bed seating products placed tantalizingly close to the moderately-priced seats in the back."

Old Seats vs. New Seats

"Seating has not got worse, it's that more people want to travel, and they are prepared to compromise their experience to cut costs. Choice has never been greater for the traveler. They can choose anything from a no-frills short haul flight to a luxurious intercontinental experience with a chauffeur to the airport, private lounge access and a butler on-board. The real issue is what are

people actually prepared to pay for? The majority of economy passengers will often opt for the cheapest possible fare. In view of this, it is no wonder that low cost air-lines have flourished—the market has demanded and the industry has responded. The lower the cost of the ticket, the more seats will be required in the cabin, and the less leg room can be expected for the passenger."

Putting the Premium in Economy

"I believe premium economy is an area of opportunity for an airline to differentiate. Premium economy lacks true differentiation as an offer. Often, Premium Economy is sold and is only a standard economy seat with extra pitch. It is a tricky proposition for an airline, as if you make it too good, you diminish the benefit of business class. Perhaps a good Premium Economy seat should offer an ability to sleep more comfortably—albeit in a semi-recumbent position."

Putting Design to Work

"I think designers, airlines and

Q & A



seat suppliers are working very hard in a competitive market to provide the best possible experience for passengers and [to] differentiate their brand. Airlines also have to balance this ambition with the commercial realities of creating a viable business model and seating enough passengers.

That said, I think there could be real scope to innovate in economy if it's dealt with in the right way. The fundamental canvas of aisles and seat-tracks is well-ingrained. But perhaps there is another way of doing things. Acumen put

a single aisle in First Class for the Etihad A380 to create a whole new canvas for the cabin layout—this was a huge step for everyone involved. That's the kind of thinking we need to shake-up economy, but it requires collaboration with the airframe manufacturers to say: 'How can we make this aircraft more flexible?' Then maybe we can give passengers more of what they want."

What's In Store for Tomorrow?

"I think that cabin-zoning is a concept which has been lightly

explored by various airlines, yet it has untapped potential to offer more choice and differentiation. This principle is used to good effect by low-cost carriers to monetize over-wing exit seats and bulkhead seats. There are many different types of passengers with different environmental requirements which could be addressed without the need for large-scale investment in new product." ●

Marisa Garcia is the Aviation Editor at Skift.

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THE BUSINESS CASE FOR MORE DIVERSITY IN TRAVEL LEADERSHIP

Carnival Corporation CEO Arnold Donald oversees one of the most valuable travel companies in the world. He's also one of the few people of color in a leadership role at a major travel brand. Skift's Jason Clampet recently spoke with Donald about what the industry needs to do to make sure its executive ranks are as diverse in the United States as the destinations that they visit. Here is a sampling of Mr. Donald's quotes:

"Here's the deal: Businesses sustain success over time through one common feature. It's called innovation. You have to innovate.

If you do not innovate over time you will be displaced or become obsolete. You have to innovate. Innovation by definition means thinking outside the box.

"If you want diversity of thinking, having diverse workers and diverse leadership and diverse management doesn't guarantee diversity of thinking, but you have a far greater probability of it if you have diversity in your ranks than if you don't. It is a business imperative. What anybody needs to do if they want diversity is they have to proactively intervene to create that diversity because human beings naturally cluster. It's our nature.

"You have to be proactive in your intervention to engineer the diversity. In our case a lot of it happened naturally because we go to so many places in the world and we recruit from so many different places for our ship board personnel as well as our shore side personnel. At the top we have to force that inclusion and that focus on diversity.

"We now have four women presidents of our brands. We have an LGBT president of a brand. We have an African-American who's the president of a brand. My security officer is African-American. My general counselor is Hispanic.

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CEO INSIGHTS

“You want your team very diverse, so as they’re working together they’re bringing all those different perspectives.

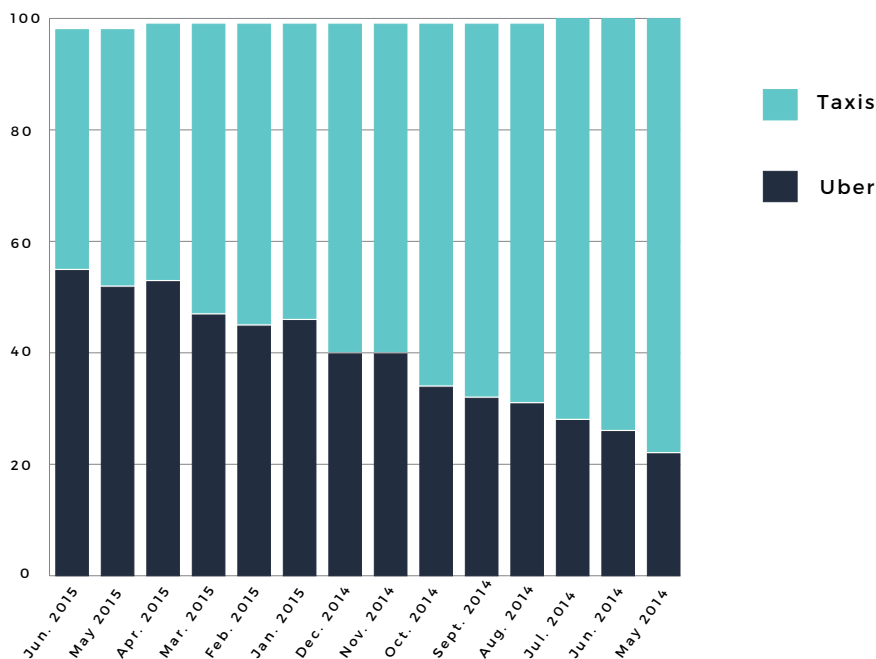
“That’s been my personal experience in all the different business and not-for-profits that I’ve worked in. I’ve had some significant breakthroughs

personally in engineering teams that way and continue to do so here at Carnival. That’s the spiel. You’ve got to proactively intervene, you have to think about diversity broadly, and you have to think about diversity in the basic concept, too, of just getting people who really are. They look different. They grew up

different from each other and all that. They speak differently. You need that.” ●

CHART

BUSINESS TRAVEL EXPENSES: UBER VS. TAXIS





Source: Certify SpendSmart Report, April 1, 2015 - June 30, 2015



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BRIGHT IDEAS



CUSTOMER EXPERIENCE IS THE **NEW** CUSTOMER SERVICE

BY COLIN NAGY

When customer service is done exceptionally well, it's in part due to the predictive skills of the particular customer service representative. It's like a game of checkers: understanding fairly predictable outcomes and always trying to think a step or two ahead.

Customer service exists to help alleviate friction. Need help with a booking decision? Had a disrespectful flight atten-

dant? The feedback channels for companies to deal with this friction may have become more complicated thanks to social media, but generally speaking, the operational protocols are the same: common situations that have been workshopped by CSR trainers to arrive at a customer-friendly resolution.

They way someone is treated at the Ritz-Carlton or a Danny Meyer restaurant when something goes wrong will generally differ greatly from treatment by

someone at Spirit Airlines. The former has been highly trained to react to fluid situations with empathy, and in the case of the Ritz-Carlton employee, given a daily stipend to make things right for guests. The latter has to read from a static script or decision tree with the "no" button close at hand.

But even at its finest, customer service is merely one piece of the entire puzzle.

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BRIGHT IDEAS

chess. It is the aggregate of thousands of micro experiences a customer has with your brand and it presents countless opportunities to engender loyalty. There are myriad variations and outcomes, all of which need to be thought out and stewarded appropriately.

In hospitality, this now means examples such as how a guest interacts with your media (beautiful native ad or interruptive banner?), digital touch points, mobile and social content, and the booking process. It extends through check-in, experiencing the product or service, and sharing an experience with the wider world.

When the customer experience is fragmented or choppy, the culprit is often a hopelessly siloed organization — “It’s not my job.” But when it works, everything is harmonious between the online and “live” experiences, and friction is removed.

Fast Company recently unearthed an old academic paper from interaction designer Kerstin Blanchy on what the discipline can learn from the key principles of Japanese hospitality, or omotenashi.

They takeaways are simple in theory, but difficult in practice:

- **Anticipate needs**
- **Flexibility**
- **Understatement**

These tenets of customer experience also inform the digital sphere: data, targeting, UX. Principles that haven’t changed in a 1,300-year-old ryokan might just be the Rosetta Stone that governs an overarching digital and real-life customer experience today.

“To draw meaningful conclusions from user actions seems the [primary] motenashi challenge of today,” Blanchy says in the article, citing how Google Now attempts to anticipate your search queries and recalculates your driving directions when you change your mind.

All of the data in the world is much more powerful when placed in the hands of a well-trained, empathic person that can anticipate, be flexible, and help steward a cohesive experience. ●

Colin Nagy is Executive Director at The Barbarian Group.

MILLENNIALS CHANGING BUSINESS TRAVEL

Given the rapid development of technology over the last 20 years, brands have been forced to quickly adapt to a new generation of connectivity and accessibility.

“Millennials travel differently than other generations do,” says Scott Kerr, executive director of business insights and analytics at Time Inc. “Hospitality brands have to understand that millennials approach travel with a unique agenda anchored in a tech-native, socially aware, experience-oriented and thrifty mindset. They’ll seek out virtual resources to plan their trip — relying more on feedback and user comments than their older counterpart. They’ll also share their real-time adventures with friends and family.”

As on-demand services continue to grow and gain traction, more travel providers will need to take advantage of their capabilities to lure the Millennial business traveler. Already, the Andaz Liverpool Street in London is offering room service directly through its smartphone app. Some 46 of Marriott’s properties allow for “special services” to be ordered through their apps. Virgin’s hotel app even allows guests to order on-demand movies. Iterations on that concept are limitless.

Mobile technology will be the center of this development. “I think that the younger generation just expects that this is the primary channel through which they’re going to buy most things in life,” explains Luke Schneider, CEO of Silvercar.

Read more about how millennials are changing business travel at:
products.skift.com/trends

WHAT

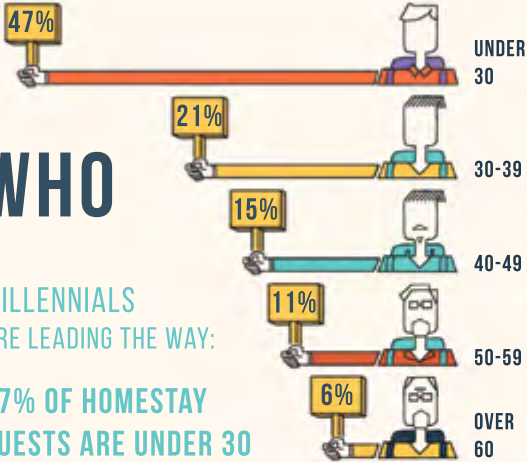
HOMESTAYS INVOLVE
RENTING A PRIVATE SPACE
WHEN THE HOST IS PRESENT



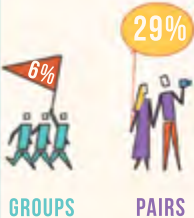
WHO

MILLENNIALS
ARE LEADING THE WAY:

47% OF HOMESTAY
GUESTS ARE UNDER 30



40% = EUROPE
28% = ASIA PACIFIC
12% = NORTH AMERICA
10% = SOUTH AMERICA
8% = MIDDLE EAST
2% = AFRICA



\$77K+

ANNUAL HOUSEHOLD INCOME OF SHARED SPACE RENTERS IN THE U.S. AND U.K.

The WHAT, WHO
WHERE & WHY of

HOMESTAY



WHERE

TOP 5

HOMESTAY
CITIES

BY BOOKINGS:



LONDON

DUBLIN

HAVANA

TORONTO

EDINBURGH

FASTEST-GROWING CITIES:

LISBON, CHICAGO, BARCELONA, BUENOS AIRES AND BANGKOK

WHY

TRAVELERS WANT
AUTHENTIC
LOCAL EXPERIENCES

TOP 5
REASONS FOR BOOKING

TOP 5
REASONS FOR HOSTING



HOMESTAYS VS. EMPTY RENTALS

Homestays represent a growing category within alternative hospitality as more travelers seek to connect directly with locals while saving on rooms.



As more travelers are looking to act more like locals than tourists, homestays—home rentals where the host is present—are an increasingly popular hospitality choice.

These travelers seek out authentic and unique experiences, embrace the sharing economy, and practice responsible tourism. As these interwoven trends spread among global consumers across generations, homestays represent an enormous opportunity for growth. In the U.S., the shared-accommodation sector expanded from 3 percent of the private-rental market in 2012 to 9 percent in 2014.

Traditionally, hosted travel was limited mostly to students and arranged offline. The rise of digital tools to connect hosts and guests is fostering wider participation. Early on, Couchsurfing built a community around the idea of no-fee hosted stays

as a cultural exchange, while Airbnb has bred multitudes of “micro-entrepreneurs”—some offering up entire homes and others renting rooms. Companies such as Homestay.com, featuring listings from 50,000 hosts, are now focusing solely on the people-to-people space.

Last year, nearly 1 in 10 travelers in the U.S. and U.K. rented a shared space, compared with 1 in 5 who rented whole homes. Expect this proportion to expand as travelers move away from predictable tourist routines to pursue more personal connections to places and greater immersion in unfamiliar cultures.

Interest in homestays crosses generations—the market isn’t solely a Millennial or a budget-conscious one. A majority of shared-space renters are 35-plus, and 22 percent are 55 and up, according to Phocuswright research. And nearly half of all

shared space renters in the U.S. and U.K. have an annual household income above \$77,000.

Homestay.com mentions the value proposition—on average, the global price of a homestay night in 2014 was \$46—but the emphasis is more squarely on people-powered experiences. The idea is to “discover faces, not places.” A 2015 Homestay survey of 2,500 of its guests found that 37 percent had booked a stay because they wanted a local experience, whereas 14 percent cited value for money.

Another trend likely to drive interest, given the social nature of homestays, is the rise in solo travel. The 2015 Visa Global Travel Intentions Study, which polled travelers across 25 countries, found that 24 percent had traveled alone on their most recent overseas leisure trip, up from 15 percent in 2013. ●

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SKIFT MANIFESTO

ON THE FUTURE OF TRAVEL IN 2020.

SKIFT IS THREE YEARS OLD, AND ON OUR THIRD ANNIVERSARY EARLIER THIS SUMMER, WE RELEASED THE FOLLOWING MANIFESTO. THE SKIFT MANIFESTO BRINGS TOGETHER THE THEMES WE HAVE TALKED ABOUT IN THE LAST THREE YEARS, AND SOME LESSONS WE HAVE LEARNED ABOUT THE LARGER CHANGES HAPPENING IN CONSUMER BEHAVIOR— ESPECIALLY DIGITAL HABITS— AND HOW THEY GET REFLECTED IN TRAVEL.

AS SKIFT CONTINUES TO BE THE INTELLIGENCE BRAND THAT HELPS TRAVEL COMPANIES DECIPHER AND DEFINE TRENDS, WE ARE LOOKING AT THE FUTURE HAPPENING RIGHT BEFORE US, THE COMING

FUTURE OF TRAVEL IN 2020.

ENJOY.

SKIFT MANIFESTO

THE FUTURE OF TRAVEL IN 2020

SKIFT

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TRAVEL

IS THE WORLD'S
LARGEST INDUSTRY,

LETS START ACTING LIKE IT.

SKIFT

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WE BELIEVE

THE BUSINESS
FUTURE OF TRAVEL
IS AT THE
INTERSECTION
OF **TECHNOLOGY**
+ MARKETING.

WE BELIEVE

THE CREATIVE
FUTURE OF TRAVEL
IS AT THE
INTERSECTION OF
USER EXPERIENCE
+ DESIGN.

SKIFT

#SKIFT2020

THE FUTURE OF TRAVEL _____

WILL BE DEFINED BY UNDERSTANDING THE LARGER CONTEXT IN WHICH TRAVEL OPERATES, NOT BY NAVEL-GAZING.

THE FUTURE OF TRAVEL _____

WILL BE DEFINED BY THOSE WHO BUILD AROUND TRENDLINES, NOT HEADLINES.

SKIFT

#SKIFT2020

THE FUTURE TRAVEL
"CONSUMER IN"
INSTEAD OF
"SILOS OUT."

BEING FANATICALLY FOCUSED ON THE CHANGING CONSUMER BEHAVIORS ACROSS ALL SECTORS, NOT JUST TRAVEL.

STRATEGISTS, TECHNOLOGISTS AND MARKETERS IN TRAVEL,

THE PEOPLE CREATING THE FUTURE OF TRAVEL IN 2015 AND BEYOND.

SKIFT

#SKIFT2020

THE TRAVEL BRANDS OF THE FUTURE

DIGITAL HAS ENABLED THE RISE OF EARLY ADOPTERS, FANBOYS AND PROSUMERS ACROSS VARIOUS INDUSTRIES.

IF EVERYONE'S AN EXPERT, HOW DO YOU CATER TO THIS DEMOGRAPHIC SEEKING A DEEPER CONNECTION?

BRANDS SHOULD BUILD A BUSINESS AROUND HELPING TRAVELERS CONNECT TO THEIR IMMEDIATE SURROUNDINGS AND THE PEOPLE AROUND THEM, RATHER THAN JUST DIGITAL CONNECTIVITY.

SKIFT

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THE FUTURE OF TRAVEL

WILL BE WON BY THOSE BRANDS THAT UNDERSTAND THE 4 Ss OF CONTENT:

BE SMART, SHARP, SURGICAL & STRATEGIC.

THE FUTURE

WILL BE WON BY THOSE BRANDS THAT UNDERSTAND THAT DATA *IS* MEDIA, ESPECIALLY IF THE GOAL IS TO CREATE MEANINGFUL EXPERIENCES OUT OF IT.

SKIFT

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THE MOST FORWARD-THINKING TRAVEL BRANDS ARE DELIVERING DEEPER EXPERIENCES TO TRAVELERS BY FOCUSING ON THREE THINGS ABOVE ALL ELSE:

**INSPIRATION,
PERSONALIZATION
&
A PATH TOWARD
SELF-DISCOVERY.**

SKIFT

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**THE FUTURE OF
THE WORLD IS CITIES.**

**THE FUTURE OF TRAVEL
IS IN CITIES.**

**THE FUTURE OF TRAVEL
IS SMART CITIES
THAT WORK FOR
BOTH LOCALS AND
TOURISTS ALIKE.**

**CARING FOR LOCALS FIRST
MEANS BEING BETTER
ON THE GLOBAL STAGE.**

SKIFT

#SKIFT2020

**THE RISE OF
SMART CITIES
IS CREATING
THE RISE OF THE
SMART MOBILITY ERA.**

PLANNING, BUYING & UNDERTAKING TRAVEL WILL NO LONGER BE DISCRETE PARTS TO BE PUT TOGETHER.

THE JOURNEY AND ITS BOOKING WILL BE AS SEAMLESS AS POSSIBLE, OFFERING SOLUTIONS TO PROBLEMS WHEN THEY HAPPEN, AND IF POSSIBLE EVEN BEFORE THEY HAPPEN.

SKIFT

#SKIFT2020

**ALTERNATIVE TRAVEL IS
NOW A REALITY ACROSS
THE WORLD.**

FUELED BY THE MARKETPLACE MODEL, WHICH HAS TAKEN THE BEST OF ONLINE, MOBILE, AND SOCIAL TO CREATE TRAVEL PRODUCTS THAT ALLOW PEOPLE TO FIND RIDES OR ALTERNATIVE ACCOMMODATIONS WITH PREVIOUSLY UNHEARD OF EASE.

**TRANSACTIONS ARE EASIER,
DISCOVERY IS FASTER, AND
FEEDBACK IS TRANSPARENT.**

SKIFT

#SKIFT2020

THE FUTURE OF TRAVEL IS QUIETLY BEING CHARTED IN THE GLOBAL HOSPITALITY SECTOR.

THERE IS A FOUR-SIDED COLLISION
HAPPENING IN HOSPITALITY AND
IT WILL CHANGE ONE OF THE WORLD'S
LARGEST SECTORS FOREVER.

SKIFT

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1 THE FORMER SHARING ECONOMY, AIRBNBS OF THE
WORLD, NOW RENTAL ECONOMY, IS MOVING UP THE
CHAIN & TAKING OVER THE VACATION RENTALS SECTOR.

THE VACATION RENTALS SECTOR REALIZES
IT CAN'T SIT OUT THE CITY RENTALS
REVOLUTION AND IS JUMPING RIGHT IN. **2**

3 THEN THIS ALTERNATIVE ACCOMMODATION SECTOR IS
COLLIDING WITH THE ORGANIZED HOTEL INDUSTRY &
STEALING AWAY SHARE IN WAYS BIG AND SMALL.

ALTERNATIVE ACCOMMODATION IS ALSO COLLIDING
WITH ONLINE BOOKING PLAYERS, AS ORGANIZED
HOTELS IS THE BIGGEST MARGIN GAME FOR THEM. **4**

SKIFT

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THE ON-DEMAND ECONOMY WILL
LEAD TO FURTHER UNBUNDLING OF TRAVEL
SERVICES, ESPECIALLY HOSPITALITY.

FULL-SERVICE HOTELS IN DENSE
URBAN ENVIRONMENTS WILL
BE AFFECTED MOST.

CONSUMERS WILL
PIECE TOGETHER THEIR OWN
EXPERIENCE OF A HOTEL,
BEYOND JUST A ROOM WITH A BED.

SMART TRAVEL BRANDS
OF THE FUTURE WILL
INTEGRATE THE RIGHT ON-DEMAND
SERVICE, MAKE THEM SEAMLESS FOR
USERS TO ACCESS & USE.

SKIFT

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YOU ARE, THEREFORE YOU BOOK.

FROM MAPS TO MOBILE TO WEARABLES TO PHOTO
TO MESSAGING APPS & SERVICES, TRAVEL BOOKING
IS BECOMING UBIQUITOUS, EVER-PRESENT.

UBIQUITOUS BOOKING
WILL BECOME THE NORM,
INSTEAD OF GOING TO
BOOKING SITES OR APPS.

SKIFT

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TRAVEL BRANDS THAT IGNORE
MESSAGING PLATFORMS
SUCH AS WHATSAPP AND SLACK
IGNORE THE FUTURE OF HOW
PEOPLE COMMUNICATE GLOBALLY,
AT WORK AND AT LEISURE.

TRAVEL BRANDS AND APPS
THAT AREN'T MESSAGE-CENTRIC
WILL NEED TO TRANSFORM THEMSELVES,
OR ELSE FIND A WAY TO INSERT THEMSELVES
INTO THE MESSAGE ECONOMY.

MESSAGING IS HOW YOU BREAK OUT
OF THE TYRANNY OF THE ONLINE TRAVEL SEARCH
BOX, IN USE SINCE 1995.

THE ONE-SIZE-FITS-ALL TYRANNY OF THE SEARCH
BOX IS NOT A PLACE FOR CONNECTION.

SKIFT

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**UBIQUITY,
EFFICIENCY,
EASE OF USE,
CONNECTION,
CONVERSATION.**

CATERING
TO THE
ON-DEMAND
GENERATION

THIS IS THE NEXUS OF
WHERE THE NEXT GREAT
TRAVEL BRAND OF THE
FUTURE WILL BE BUILT.

SKIFT

#SKIFT2020

2020

THE UNBUNDLING
OF EVERYTHING

THE ON-DEMANDIFICATION
OF EVERYTHING

THE MOBILITY
OF EVERYTHING

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#SKIFT2020

**SKIFT:
DEFINING
THE
FUTURE
OF
TRAVEL**

SKIFT

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FAULT LINES: CONFLICTS

DETERMINING THE FUTURE OF TRAVEL

Conflict doesn't have to be a bad word, and two opposing ideas don't have to compete until one comes up the winner. Sometimes they build off of each other to create something better. Disruptors may have legacy brands worried they're about to fall off a cliff, but the challenge the newcomers offer can also light a fire under the incumbents that will lead to the next great evolution of their product.

– Jason Clampet

GLOBAL TRAVEL GROWTH **VERSUS** VACATION-LESS AMERICANS

BY ANDREW SHEIVACHMAN



Americans are hesitant to take vacations because they're too busy and too frugal. Thankfully, China and other nations with emerging economies are traveling for leisure more than ever before.

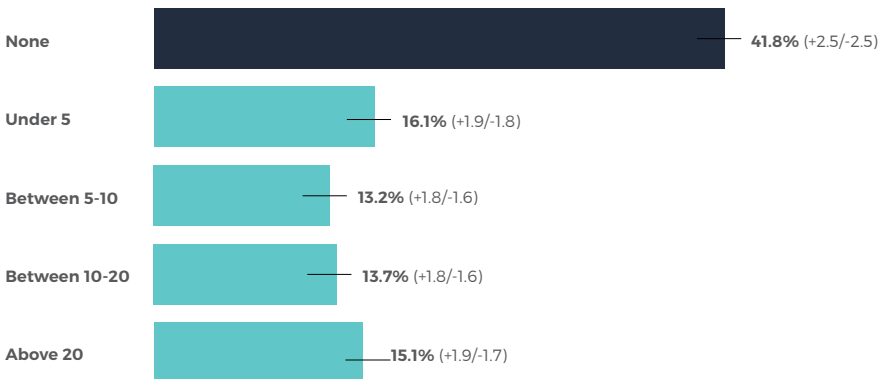
Taking a vacation seems impossible to many Americans.

Economic and professional realities are constraining the traditional American vacationer, despite the millions spent by travel brands to entice workers to clock out at the office and spend quality time out of town with their families.

THE FAULT LINES

How many vacation days did you take in 2014?

Results for all respondents. Weighting: Off. (1501 responses) Winner statistically significant.



Methodology: Conducted by Google Consumer Surveys, January 03, 2015 - January 05, 2015 and based on 1501 online responses. Sample: National adult Internet population.

U.S. workers are afraid to take time off due to fears of losing their job or being inundated with the work they missed while on vacation after their return. The increased costs of airfare price out many potential travelers, especially families with children.

In fact, more than half of Americans haven't taken a vacation in the last year and they feel satisfied with their decision. And international travel by Americans has been essentially stagnant in recent years.

The U.S. is now known as the "No-Vacation Nation." But as the American middle class struggles to find the time and money to take vacations, emerging markets and developing markets are picking up the slack.

The growth of the global tourism industry continues to outpace the overall rate of global economic growth, according to the World Travel & Tourism Council. A major part of this is the increased travel habits of Asian and South American families.

International tourist arrivals will increase significantly each year for more than a decade. By 2030, emerging economies are expected to account for more than half of all international tourist travel.

The expanding middle classes of countries like China, India and Brazil are spending more money than ever before on travel and bringing entire families, from toddlers to great-grandparents, along for the ride.

Outbound travel by the Chinese will continue, even as the Chinese economy faces strong headwinds as a result of its recent instability. Their destinations may be more regional than in recent years, substituting the Middle East for Europe or South Asia for North America, even though France, the U.S., China and Spain currently remain the most popular individual international travel destinations in the world. ●

Andrew Sheivachman is a Skift Reporter specializing in travel agents and the cruise industry.

THE FAULT LINES

CORPORATE TRAVEL VERSUS BUSINESS TRAVELERS

BY GRANT MARTIN



THE FAULT LINES

More and more power is now in the hands of business travelers, leaving corporate travel programs stuck between their legacy travel contracts and an informed and unsatisfied user base. This power shift is largely driven by better tools developed specifically for business travelers, giving them better access to airline and hotel data, which in turn leads to more efficient travel.

Concur, for example, is shaping much of this innovation. Just last year, the travel and expense management service integrated both Uber and Airbnb into its platform to allow business travelers more flexibility in how they choose lodging and transport.

Both Airbnb and Uber have also pushed the business traveler agenda in their own realms. This year, Airbnb opened a new portal geared directly to business travelers, offering guaranteed amenities and quality control in each property. Uber has aggressively been pursuing partnerships with other travel industry players such as Starwood, building in incentives for users to seamlessly flow from one product to the next.

Business travelers have also become more independent due to changing demographics and the technology-forward mindset now essential in many business places. Searching for and sorting through myriad flight and hotel options is now easier than ever thanks to strong technologies like Google Flights, as well as the ubiquitous mobile connectivity that make “anytime, anywhere” bookings possible. Thus equipped, many young business travelers are starting to see corporate

TO SURVIVE IN THE FUTURE, CORPORATE TRAVEL WILL NEED TO PUSH FOR MORE INNOVATION LIKE THE AIRBNB AND UBER INTEGRATIONS, EXPANDING THE REACH OF CORPORATE INFLUENCE AND EXPENSE MANAGEMENT WHILE BALANCING THE NEEDS OF EMPLOYEES WITH A WORLD OF TRAVEL TOOLS AT THEIR FINGERTIPS.

restrictions as a hindrance rather than a blessing.

Even so, the role of corporate travel remains a fixture in this technology-fueled economy. Bulk corporate contracts still have the ability to negotiate discounted rates across entire organizations, while the executive perks that they offer keep management subscribing.

To survive in the future, corporate travel will need to push for more innovation like the Airbnb and Uber integrations, expanding the reach of corporate influence and expense management while balancing the needs of employees with a world of travel tools at their fingertips.

Mobile will play a big role in that evolution. As more travelers get comfortable with the integrated computers and cameras in their pockets, new mechanisms for faster mobile itinerary-planning, real-time support and robust expense management will need to be perfected to streamline the process.

In the end, the constraints of corporate travel programs will continue to keep rambunctious business travelers in check for the near term, but new technologies and a curious user base are eventually going to erode away that loyalty. Only by evolving — quickly — can the traditional corporate travel program survive. ●

Grant Martin is Skift's contributing editor specializing in business travel.

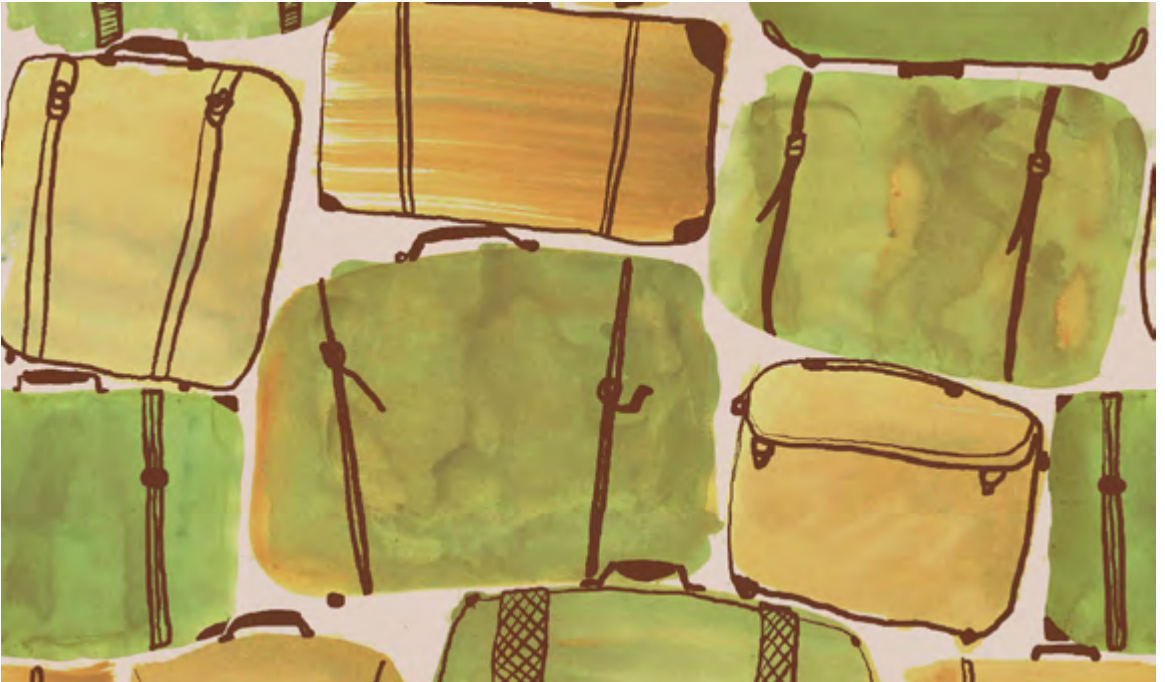


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PACKAGED VERSUS UNBUNDLED TRAVEL

BY ANDREW SHEIVACHMAN

Corporations love the idea of selling things that used to be packaged together separately in order to drive more revenue. It remains to be seen whether their customers will unleash a backlash against endless nickel-and-diming.

Travelers are paying more to receive amenities and services that were formerly de rigueur. By unbundling their products, hotels and airlines have increased revenue while inundating consumers with fees and surcharges.

Bundling, or selling many items together in one package at a single inclusive price, was the norm across the airline industry. The ticket price included several pieces of checked baggage along with free food and beverages onboard. Not to mention a complimentary headset for in-flight entertainment.



Stay Unique.

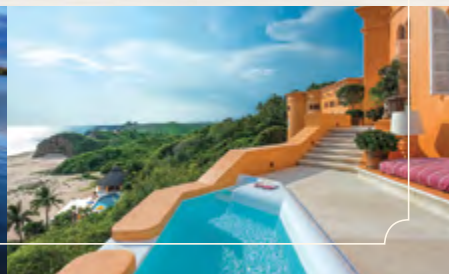
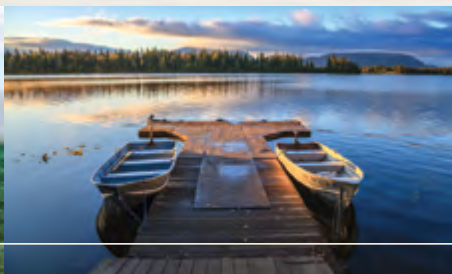
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THE FAULT LINES

Worldwide Estimate of Ancillary Revenue

2014 Estimate	2013 Estimate	2012 Estimate	2011 Estimate	2010 Estimate
\$49.9 billion (6.7% of global airline revenue of \$746 billion)	\$42.6 billion (6% of global airline revenue of \$708 billion)	\$36.1 billion (5.4% of global airline revenue of \$667 billion)	\$32.5 billion (5.6% of global airline revenue of \$577 billion)	\$22.6 billion (4.8% of global airline revenue of \$474 billion)

Source: Ancillary revenue statistics applied by IdeaWorksCompany to individual airline revenue results for the year indicated from Air Transport World, Airline Business, and at airline websites.

The labor costs of checking bags and providing food, of course, were included in the price of the fare. But increasing fares to drive revenue would only make airlines uncompetitive.

Now the base fare available from many airlines, like Delta's Basic Economy fare, includes none of the usual amenities. The lower fares give the impression to consumers that flights are cheap, but the reality encourages them to also purchase costly add-ons that inflate the total purchase price.

Flyers are encouraged to add-on things like checked bags and priority boarding as ancillary purchases outside their basic fare.

Spirit Airlines has acted as one of the pioneers of unbundled fares among U.S. airlines and have been shameless in the embrace of unbundled travel.

"At Spirit, I go to bed at night thinking how can I lower the fare tomorrow," Spirit CEO Ben Baldanza told Skift. "I think of getting more ancillary revenue or I can find a way to shave some more cost—in an area that isn't safety-related, of course."

"AT SPIRIT, I GO TO BED AT NIGHT THINKING HOW CAN I LOWER THE FARE TOMORROW," SPIRIT CEO BEN BALDANZA TOLD SKIFT. "I THINK OF GETTING MORE ANCILLARY REVENUE OR I CAN FIND A WAY TO SHAVE SOME MORE COST."

Ancillaries also aren't taxed by the U.S. government as deeply as airfares are, making them even more profitable for airlines.

Hotels have been unbundling since the 1990s, but they've recently stepped up efforts to make more money off of consumers by selling them things that used to be free.

Mirage Las Vegas, run by MGM Resorts International, now offers a \$30 nightly fee to skip the check-in line. At Bellagio, guests can pay \$30

to ensure they receive a smoking room, non-smoking room or a choice of floor location.

The phenomenon is not unique to the travel industry and is becoming commonplace across the business world. Television networks like HBO, for instance, are now selling subscriptions directly to consumers, instead of being packaged by cable providers.

But will consumers fight back against travel companies looking to hate-sell them upgrades and force them to pay extra for comfort? Time will tell. ●

THE FAULT LINES

The world's biggest legacy airlines are having an identity crisis, and so are their "low cost" cousins. Sure, the actual title of "low-cost carrier" goes to the likes of Norwegian, JetBlue, Spirit or Southwest, but in truth, the low-cost revolution in air travel has jumped the jet bridge.

JetBlue has abandoned a simple low-cost economy offer to include a transcontinental business class service that rivals that of American and United. Delta has unveiled unbundled fares in a move to match the bargain-basement policies of Spirit. Southwest will let you change your ticket for no fee (plus the fare difference) — which feels like a legacy perk from the old days. The brass at low-cost juggernaut Ryanair sees a future where its jets cross the Atlantic. Finally, Norwegian is ramping up its surprisingly strong presence in the U.S. with an ever-growing discounted long-haul service. Confused yet? It all feels like a copycat-riddled arms race.

When Norwegian announced that, in addition to its existing transatlantic services on Boeing 787s, it would be flying Boeing 737s to the US, it signaled a new paradigm in the international air game. Come December, the airline's signature red noses will poke themselves into direct service from European territories in the Caribbean to the United States. Surely the last thing that any long-established U.S. airline wants to see is a low-cost carrier's 737 on its home tarmacs.

Norwegian's founder and CEO Bjorn Kjøes has let the genie out of the bottle. He and his route-planning folks are redefining business and network models. If the venture is successful, the copycat trends will likely hold true and other airlines could follow suit.

What's actually most impressive about Norwegian's moves is that they're unique. While everyone else is waiting to see what the other guy does (charge for this, penalize for that, whine to the transport authorities about everything else), this fast-growing, take-no-prisoners airline has bootstrapped its way into the headlines by defying the critics and doing what it thinks the market needs.

This should be seen as a lesson and opportunity for the increasingly whiny and greedy competition to wake up and get busy. They consolidated, scaled back their offers, and gutted their loyalty programs. They assumed we'd just have to deal with it. But we don't. If low-cost rivals are offering us new travel options, smiling cabin crews and at least admitting to being cheap, then the old guard will most likely find itself outgunned. ●

Tristan McAllister is Monocle's Transport Editor.

THE FAULT LINES

RIDE-HAILING VERSUS CAR RENTALS

BY DENNIS SCHAAL



THE FAULT LINES

In the clash between ride-hailing apps such as Uber, Lyft and China's Didi Kuaidi, on the one hand, and major car-rental firms such as Hertz, Enterprise and Avis Budget Group, on the other, there are the talking points that the car-rental industry wants you to believe...versus the reality.

have not yet made a material impact on the car-rental companies' operations.

But in a rare moment of candor from a car-rental executive about the issue, Hertz CEO John Tague conceded to financial analysts over the summer that ride-sharing companies "obviously have an impact and



WE CAN SEE THAT FROM OUR USAGE DATA AND SOME OF THE PUBLISHED TRAVEL REPORTING AND EXPENSE REPORTING THAT'S GONE ON IN THE MARKET, ”

HERTZ CEO JOHN TEAGUE.

The party line goes like this: Despite Uber's expansion into more than 300 cities around the world and the increasing propensity among business travelers to break out their ride-hailing apps to scurry around from meeting to meeting in a given city, the largest car-rental companies are still achieving healthy growth rates and haven't been adversely impacted.

If you peruse Hertz's and Avis Budget Group's public financial disclosures, when you come to the "risk factors" they cite there is no mention of ride-hailing apps such as Uber and Lyft because they supposedly

we can see that from our usage data and some of the published travel reporting and expense reporting that's gone on in the market."

These companies' initial penetration in the market has been "very, very large" and "obviously will be a whole lot bigger," Tague said.

For now, Hertz has felt the incursion the most in its one-day rental business, which Tague characterized as the company's "least-profitable segment," but he envisions that changing with the use-case widening.

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THE FAULT LINES

“But we are certainly going to see people who link together multiple ride-sharings across such multi-day trips and still feel it’s the best choice for them,” Tague said.

“Whether I think they’re a 5 percent threat or a larger threat, it really doesn’t change what we need to do to compete effectively for customer choice there,” Tague said, arguing that Hertz needs to provide “best-in-class costs” and “the highest level of convenience ... to compete with alternative models.”

While Hertz will try to keep costs low to compete with the on-demand services, Tague makes a valid point that the ride-sharing pricing and driver model is unsustainable.

“I would somewhat challenge some of the presumptions in the market that that is a model that is going to become cheaper for customers over time,” Tague said. “I struggle with how these models are experiencing substantial losses and how do they turn that into a profit? They obviously have significant scale today. I may be simplistic, but I struggle with how you get from here to profit without rates going up, and I struggle as to how you get from here to profit with a multiplier of the current scale without drivers ... getting more at the end of the day.”

As Uber for Business, which claims to have enrolled more than 50,000 companies in its first year, gains traction as a preferred transportation option for some employees and a cost-saver for corporations, there will be a heightened battle with the car-rental industry.

Both the car-rental industry and the on-demand ride-sharing sector will inevitably change as they clash.

For example, Avis Budget acquired car-sharing service Zipcar in 2013; subsequently, its membership has grown to 915,000 people in North America and Europe, with a presence on more than 150 college campuses and 60 airports. Zipcar is piloting one-way rentals in several cities and found that members who take these one-way trips use the Zipcar service three times more than other members use Zipcar.

Still, car-sharing services face challenges from the on-demand ride-hailing apps, as well. Hertz is phasing out its Hertz 24/7 car-sharing service in the U.S. after coming to the conclusion that the return on invested capital doesn’t compare favorably with its core car-rental business.

These two sectors will undergo massive change over the next few years and Tague of Hertz may be underestimating the fallout when he says, “So I take them [the ride-sharing companies] seriously, but I don’t think they are this ubiquitous black cloud over our industry.”

Driverless cars, anyone? ●

Dennis Schaal is Skift’s News Editor.

ALTERNATIVE LODGING VERSUS TRADITIONAL HOTELS

BY GREG OATES

A combination of market forces and next generation travel trends are driving travelers away from traditional hotels toward the growing array of alternative accommodation models.

Publically, representatives from the hotel sector across all budget tiers have downplayed the impact of room-sharing companies like Airbnb and HomeAway. They uniformly state that the present rise in overall hotel occupancy and average daily rates proves the vitality of the sector. But, considering the growth of travel worldwide and improving global economy, it's only natural that hotel numbers are trending north.

Privately, hotel executives are paying close attention to the rise in sharing accommodations. Airbnb, for ex-

ample, continues its explosive year-over-year growth. Nearly 55 million guests have booked the online sharing site since 2007, and 30 million of those were in the last year. Looking just at summer 2015, more than 17 million people booked Airbnb. That's 353 times the number of bookings five years ago when Airbnb hosted 47,000 guests during the summer of 2010.

HomeAway is also showing healthy growth with Q2 2015 profits up 10.1% year-to-year. The company has been aggressively partnering with online distribution companies such as Kayak and Expedia to expand reach and drive incremental bookings.

According to Evercore's April 2015 report, "A Change of Vacation Plans," it estimates that Airbnb has now

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surpassed HomeAway in terms of the largest selection of listings. In September 2015, Airbnb offered 1.2 million booking options, versus HomeAway's 1.04 million

The big challenge for consumers considering the legacy hotel groups is rising rates and lack of perceived value. Even though established brands are rolling out more modern design schemes, the delivery is still often a generic corporate experience without any authentic narrative with the specific community. Many global hotel groups have also launched new lifestyle brands, but those are going to take years to scale, and many of them will be commoditized experiences by that time.

For traditional accommodations, the most interesting areas of innovation reside with the soft brand market,

boutique brands, and meetings and conventions.

Soft brands such as Marriott's Autograph Collection have the ability to scale quickly while retaining the unique flavor of the individual properties. Likewise, the established boutique/design brands such as Kimpton, Ace and 21c continue to expand with deliberate attention to the smallest details, based on demand for neighborhood-specific design. In the meetings segment, Marriott and Hilton especially are building much more user-friendly group hotels with more natural light, more casual areas for informal networking, and better F&B outlets with a focus on local cuisine. ●

Greg Oates is a Senior Editor at Skift.

TRAVEL AGENTS VERSUS TRAVEL CONSULTANTS

BY ANDREW SHEIVACHMAN

Don't call it a comeback. Travel agents never disappeared; the savvy agents just got serious by re-branding themselves as travel consultants and learning to specialize in what technology companies can't provide: a human touch.

A travel agent used to be essential. A normal person couldn't fly on a plane, sail on a cruise or put together a vacation itinerary without the access and expertise of a travel agent.

But the advent of online booking sites in the 1990s, and the ability for consumers to book direct with hotel brands and air carriers, quickly changed the business model for successful travel agents.

With airlines no longer offering commissions on tickets booked by travel agents, and direct bookings incentivizing consumers to book on the Internet, thousands of travel agencies were forced out of business in the last two decades.

Today, most travel agents prefer the term travel consultant. Instead of marketing themselves as a mere intermediary between the travel distribution system and travelers, they bring extensive knowledge on specific areas of travel to their clients.

No travel consultant expects, or even wants, to book a single air ticket for a client anymore. The divide between the travel agent who follows orders and the travel consultant who develops experiences could not be wider.

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More than 64,000 travel agents were active in the U.S. in 2014, according to the Bureau of Labor Statistics. Even more agents who are affiliated with a travel agency or consortia but work remotely are out there serving clients. A travel agency offering pamphlets and free coffee out of a strip mall is rapidly becoming a thing of the past.

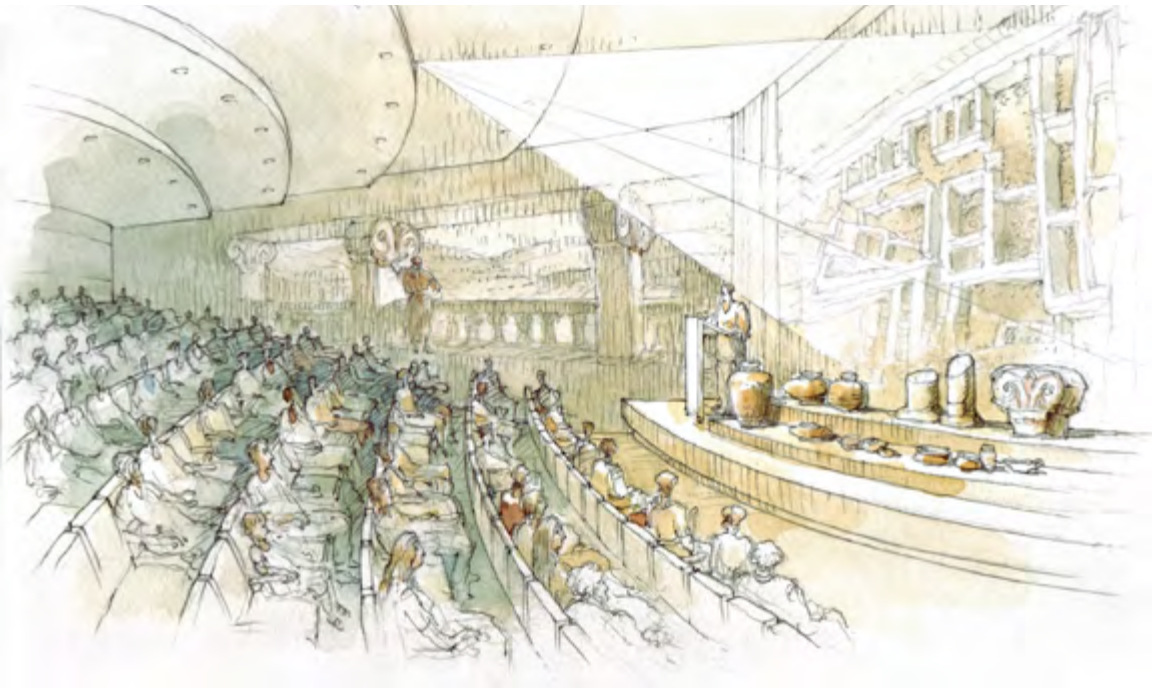
As the demand for customized and boutique experience has skyrocketed, travel consultants have positioned themselves to serve the needs of travelers looking outside the mainstream. Whether it's luxury travel, river cruising, voluntourism or LGBT-friendly experiences, there is a travel consultant out there that fits every consumer need.

Clever travel consultants have positioned themselves as advocates of their clients, especially when trips go wrong. Having a consultant rebook your canceled flight immediately after sending a text message, instead of having to wait in line at the airport with 200 other disgruntled flyers, is an amenity that travelers are willing to pay for.

Most travel consultants are still skeptical of the sharing economy. They won't, for instance, move you from one Airbnb to another if your host's apartment smells like a diaper. ●

MEETINGS EXPERTISE VERSUS MEETINGS EXPERIENCE

BY GREG OATES



A primary shift in the destination meetings industry over the last decade prioritized the value of the overall “experience” to engage attendees on a deeper, more visceral level. Destination marketing organizations, hotels, convention centers and meeting planners jumped on this trend in force by offer-

ing new lifestyle-oriented group activities ranging from cooking and mixology classes to community volunteer programs.

The more experiential programming was designed to inspire colleagues and clients to network in a more

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casual and natural way, especially for a new generation of mobile-wielding meeting attendees uninterested in the typical cocktail reception, ballroom dinner or golf event.

As these group experiences grew in popularity, travel brands began competing more and more by promoting their “wow” experiences. More exotic destinations, more production value, and more creative venues, etc., helped sell meeting owners on the value of the pumped up meeting environment and programming to deliver more “memorable experiences.”

However, there’s a new attendee profile emerging today that’s demanding a higher deliverable than just a memorable event, or if anything, a distracting over-hyped experience that doesn’t offer real opportunities for professional and personal development.

In today’s workplace scenario, Millennials especially need to expand their networks more than anything else to advance their careers, and face-to-face meetings and conferences provide the obvious platform to do that. A college education and traditional CV are much less valuable in today’s economic climate than they were pre-recession.

For these next-generation attendees, the reward for participating in a business event is actionable knowledge and accessibility to mentors who can help them rise beyond their existing networks and job description.

Seeing this trend, the most forward-thinking destinations have begun to promote their intellectual capital and sector-specific industry expertise above and beyond traditional selling points highlighting meeting, hospitality

and destination infrastructure. It represents a shift from marketing destination hardware to knowledge software, because the marketplace has become too competitive for the built environment to be a real differentiator anymore in many regions.

So DMOs from Cleveland to Hamburg are developing and promoting their ability to provide access to their top business thought leaders, most innovative companies, and leading academics — all of whom planners can integrate into their programs.

The future meeting attendee wants to arrive at a destination and plug into an urban operating system that can be customized to their professional needs. Therefore, the meetings sector needs to evolve beyond the temporal experience toward delivering demonstrable expertise. ●

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BRANDS VERSUS BOOKING SITES

BY DENNIS SCHAAL

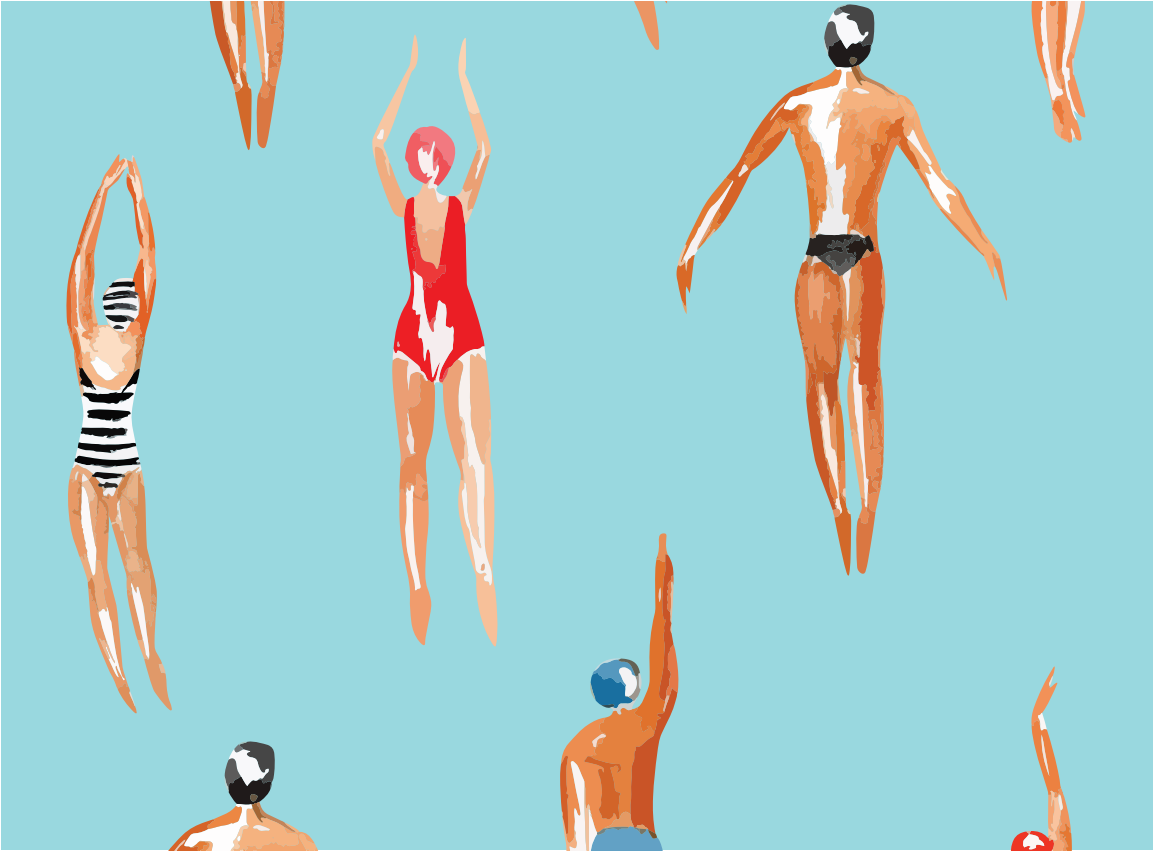
In the high-stakes online battle between hotel and airline brands, on the one hand, and online travel agencies, on the other, there are the all-important revenue and profits that are to be won or lost but ultimately the battle comes down to one key question: Who will own the customer?

As hotel brands such as Marriott and Hilton run TV commercials arguing that consumers can only get the best rates and perks, such as points and free Wi-Fi, when they book direct on the hotels' websites, and online travel agency sites such as Expedia Inc. and the

Priceline Group likewise pour hundreds of millions of dollars annually into TV advertising of their own, a new wrinkle has emerged in the hotel versus online travel agency battle — what some would consider a hybrid form of direct booking as practiced by TripAdvisor and Google.

TripAdvisor has implemented and Google is developing their own forms of direct booking. Consumers are getting the ability to book hotels directly on TripAdvisor and Google on their websites and in their apps while the hotel or online travel agency brands

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retain the customer and handle customer service in the background.

Chains such as AccorHotels are participating heavily in TripAdvisor and Google direct booking and consider their booking initiatives as a form of direct booking that come with lower commissions — for now, at least — than the chains would have to pay to online travel agencies. Other big chains, such as InterContinental Hotels Group, don't consider booking on TripAdvisor or Google as a hybrid form of direct booking and prefer to focus on driving traffic to their own websites.

Toni Portmann, the CEO of distribution switch company DHISCO, formerly Pegasus Solutions, counts hotels, online travel agencies and other distributors as partners, and wonders whether TripAdvisor and Google, with their relative comprehensiveness, will have the edge in winning consumer loyalties from hotel brands even though hotels can wield loyalty points and perks for direct bookings.

TripAdvisor, Google and online travel agency sites likely will have an advantage, Portmann argues, because consumers recheck rates an average of eight times



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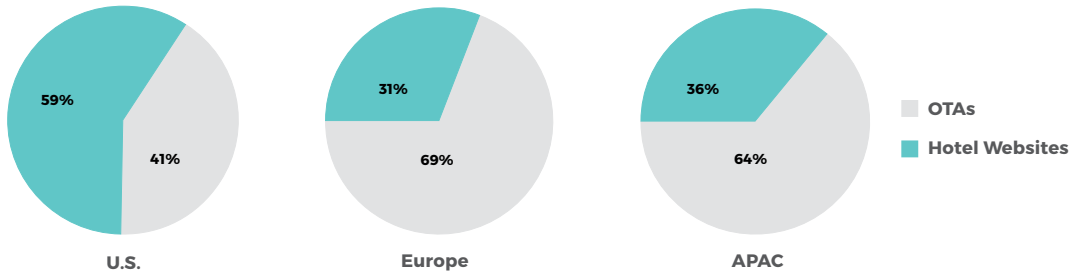
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OTA and Hotel Website Share of Online Hotel Gross Bookings By Region, 2014



Source: Phocuswright's The Yearbook 2014: The Year Ahead in Digital Travel

in the 48 hours before their stay to ensure they are getting the best pricing. Portmann suspects they are checking metasearch and online travel agency sites in the last couple of days before their stays because brand sites don't show competitors' rates and the consumers want to view the most complete picture of the market as possible.

On the hotel front, Douglas Quinby, Phocuswright's vice president, research, believes that the online travel agencies are taking market share faster than hotel brands in the U.S., Europe and Asia Pacific, although hotel websites still have a commanding lead in the U.S.

The above chart shows the hotel-online travel agency marketshare split in the U.S., Europe and Asia Pacific.

"We are tracking and forecasting that OTAs will continue to grow faster than hotel websites across each region," Quinby says. "The big driver behind this is chain penetration. Fragmented markets with more independents provide more fertile ground for OTAs. In more chain-centric markets such as the U.S. and also the U.K. and Northern Europe, hotel-direct distribution is much stronger. But OTAs still hold an edge -- especially with the infrequent, price-sensitive, brand-disloyal leisure traveler."

On the airline side, Lufthansa Group recently imposed a 16-euro surcharge on most consumer bookings that take place beyond its websites, a move designed to incentivize direct booking. In the face of lots of opposition from corporations, global distribution systems and travel agencies, it remains to be seen whether the surcharge is sustainable in the absence of other airlines matching the Lufthansa Group initiative.

While online travel agency sites such as CheapOair and Expedia are slowly getting the ability to sell some airlines' branded fares and ancillary services, carriers are still getting a direct-booking edge because many of these services and perks can only be booked on the airlines' own websites.

On the mobile front, online travel agencies may have a built-in advantage if apps win out over the mobile Web because their apps show a wide array of pricing from multiple brands. Consumers don't necessarily want to have to break out an app for each individual airline or hotel that they want to book unless they are very loyal to these brands. ●

CITIES FOR LOCALS VERSUS CITIES FOR TOURISTS

BY JASON CLAMPET

There's little surprise that you will find little overlap in the annual lists featuring Best Travel Destinations and Best Places to Live. Often the former means the latter is nearly impossible.

Picture your worst tourist nightmare. No, not slow-moving lowans walking four abreast down Fifth Avenue. More like two dozen bachelor party weekenders barfing their way down a cobblestone street in Prague only a few hours after deplaning a Ryanair flight from Manchester. And then you have to smile and speak English and sell them something they want because, hey, tourism dollars.

Do you want to live in that place?



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Now think of the bigger issues.

In Barcelona, Spain, it's an influx of tourists that has 7.6 million people (a third of which arrive by cruise ship) descending on a city of 1.6 million and turning streets in some neighborhoods into all-night party zones. In Hong Kong it's mainland Chinese who come to shop and drive up the price of both basic and luxury goods, leading developers to add what seems like a Prada shop on nearly every corner. Across the Caribbean it's the all-inclusive resorts that keep guests shut-in on properties where the only connection with the places they reside are the workers shuttled in through the security gates. In New York it's the mini-Airbnb mogul who manages a dozen apartments in the West Village, further exacerbating a housing crisis by driving up the costs of rentals.

And in Venice it's the hordes that arrive by sea and by land who have made it impossible for locals to find a place to buy bread and milk near the city center, and have caused two thirds of the city's residents to leave over the past half-century.

All of these conflicts present the worst of tourism, as if it's less of a cultural exchange, leisure escape, or learning experience and more like something akin to a plague of locusts.

But while "Venice is a lost cause," as author Elizabeth Becker called it, tourism is not always bad news.

Greg Richards, a professor at the NHTV Breda University in the Netherlands who has studied Barcelona tourism says that

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“There is no sign of a tipping point” at which the costs of tourism could outweigh its benefits.

It just needs some better planning. Take Copenhagen, Denmark for instance. It’s a top favorite for attendees of meetings, who often take advantage of their company paying for a hotel room to add a little bleisure in their trip and invite the family. It’s too expensive to descend upon as they would an Orlando or even

in convincing tourists that the locals have figured out a better way to live, and tourists want to share that with others.

I write this a few hours removed from walking down from the Acropolis in Athens — walking shoulder-to-shoulder with fellow tourists — through a neighborhood that should look great, but is one boarded up building followed by a decrepit one housing a tourist



New York, but it’s a great place to “be” and people want more.

A big part of this is that Copenhagen is focused on quality of life for locals. If tourists can benefit from this, all the better, but it’s not the city’s priority, even if there are attractive dollar signs floating around. Skift saw this in Medellin, Colombia this summer where a city laser-focused on improving quality of life for its residents — from the slums to the high street — was making it an attractive place to do business and travel.

Australia’s recent tourism success has been all about selling the country’s lifestyle. People visit and they want to live like that. Sure it has sunny weather to thank for some of the appeal, but it also succeeds

stall on the first floor, followed by another boarded up home. Greece has done everything humanly possible to cater to tourists, but this dependency hasn’t saved it from its planning errors and misplaced priorities.

Tourism’s impact on local communities is most always measured in dollars. But this is a shallow measurement that assumes the dollars stay in a community and that they’re the right kind of dollars. Do visitors buy an expensive T-shirt and an overpriced margarita, or do they go home wanting to open a restaurant highlighting the fantastic local food of the place they just visited? Do they want to live in Paris or do they want to be a Parisian? A destination truly succeeds when the latter is the answer. ●

SKIFTIES AWARDS WINNERS FOR 2015



Skifties Awards recognizes the best travel brands on social media.

The second edition of the Skifties focused on awarding travel brands for leveraging social interactions into achieving business objectives.

There were 30 categories to enter — sector, platform and initiative-based, also chose five Editor's Choice winners and one ultimate champion to be the Smartest Travel Brand on Social Media.

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SKIFTIES AWARDS WINNERS OF 2015

Most Effective Brand on Social Media

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Turkish Airlines
- + **AIRPORT:**
Denver International Airport
- + **BOOKING SITE & SERVICE:**
Airbnb
- + **CRUISE LINE:**
Azamara Club Cruises
- + **DMO COUNTRY:**
Tourism Australia
- + **DMO REGION/STATE:**
Enjoy Illinois
- + **DMO CITY/TOWN:**
Visit Las Vegas
- + **HOTEL BRAND:**
Four Seasons Hotels and Resorts
- + **INDIVIDUAL HOTEL PROPERTY & RESORT:**
The Standard, East Village
- + **TOUR & TRAVEL PROVIDER:**
G Adventures
- + **GROUND TRANSPORTATION:**
Budget Rent a Car
- + **TRAVEL MEDIA:**
Matador Network
- + **B2B TRAVEL TECH COMPANY:**
Amadeus

Best Travel Brand by Platform

- + **FACEBOOK:**
Turkey Home
- + **TWITTER:**
Hotels.com
- + **INSTAGRAM:**
Tourism Australia
- + **YOUTUBE:**
Contiki

- + **Most Engaged Community Across Social Media:**
Lonely Planet
- + **Best Social Media Customer Service:**
Hyatt Hotel
- + **Best Social Media Contest:**
Hawaiian Airlines
- + **Best Use of Twitter Chat:**
Expedia
- + **Best Use of Video:**
Brand USA
- + **Best Social Media Agency for Travel Brands:**
Beautiful Destinations
- + **Best Social Media Vendor for Travel Brands:**
Olapic
- + **Best Social Media Influencer:**
Beautiful Destinations

Editors' Choice

- + **MOST INTEGRATED SOCIAL MEDIA CAMPAIGN:**
Marriott International (#LoveTravels)
- + **BEST MULTI-ACCOUNT STRATEGY ON SOCIAL MEDIA:**
Uber (Multi-country and city)
- + **MOST INNOVATIVE TRAVEL BRAND ON SOCIAL MEDIA:**
Visit Iceland (#AskGudmundur)
- + **BEST UNDERDOG TRAVEL BRAND ON SOCIAL MEDIA:**
TSA (Instagram)
- + **BEST TRAVEL STARTUP ON SOCIAL MEDIA:**
Georama
- + **SMARTEST TRAVEL BRAND ON SOCIAL MEDIA:**
KLM

Awards Jurors

- + **DAVID BERKOWITZ,**
Chief Marketing Officer, MRY
- + **REBECCA LIEB,**
Strategic Advisor/Research Analyst
- + **MARTIN STOLL,**
Founder and President, Sparkloft Media
- + **HONORARY JUDGE: JUDY WINITZER,**
Vice President, Global Merchant
Services, Lodging, American Express



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S P E A K E R B I O S



Rafat Ali
CEO, Skift

Rafat is the CEO & Founder of Skift, the largest industry intelligence and marketing platform in travel. Previously, he was the founder/CEO of paidContent, which he sold to U.K.'s Guardian News and Media in 2008. Prior to that, he was managing editor of Silicon Alley Reporter.



Scott V. Alvis
CMO, Amadeus,
North America

As the Chief Marketing Officer for Amadeus North America, Scott Alvis focuses on product marketing, marketing communication, market research, public relations and business planning for Amadeus' distribution, airline IT and new business efforts in the U.S. and Canada. Based out of the Chicago office, Scott joined Amadeus in 2010 as the Senior Vice President, client management for airline IT and distribution, where he fostered and managed IT and business relationships with major airlines in the U.S., Canada and Latin America.



Ross Babbitt
SVP,
Programming &
Development,
Travel Channel

Babbitt currently oversees all creative and editorial direction of the network's team of producers and programming partners. Previously, Babbitt oversaw the production team for some of the network's most popular series including Bizarre Foods America, Hotel Impossible, and Mysteries at the Museum. Prior to joining Travel Channel, Babbitt worked at sister network DIY Network and also worked as a writer, producer and/or director for Food Network, Comedy Central, ESPN, Lifetime, CBS News Productions, and 20th Century Fox.



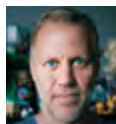
Keith Barr
CCO,
InterContinental
Hotels Group

As the Chief Commercial Officer, Barr is responsible for leading IHG's global brand, loyalty, sales, marketing and distribution functions as well as for driving consistent strategies across all geographies and leveraging IHG's global scale and systems to deliver continued industry performance. He was previously Vice President of Operations for midscale brands in North America, Vice President of Operations for the Holiday Inn brand in North America and Chief Operating Officer for Australia, New Zealand, and South Pacific.



Ninan Chacko
CEO,
Travel Leaders Group

Ninan Chacko serves as CEO for Travel Leaders Group, a North American travel company that generates gross travel sales of approximately \$20 billion and directly employs over 1,000 staff managing operations of more than 6,500 company-owned, franchised and affiliated travel agencies in the U.S., Canada, the U.K., Greece, Ireland and Australia. Prior to joining Travel Leaders Group, Chacko served as CEO of PRNewswire and Chief Commercial Officer of the world-wide travel information, e-commerce and technology service provider Worldspan.



Chris Collins
Executive
Producer &
Co-Founder,
Zero Point Zero

Chris Collins began his career in 1985 as a Marketing Manager for Coca-Cola products in Papua New Guinea. In 2003, Chris started Zero Point Zero Production with his long-time co-producing partner, Lydia Tenaglia, growing the company over the next 11 years to a 150-person company producing over 80 episodes of television across seven different series. Together they created and continue to Executive Produce the Emmy Award-winning series Anthony Bourdain: No Reservations and Anthony Bourdain: Parts Unknown.



Kim Day
CEO, Denver
International
Airport

Day began leading Denver International Airport (DEN), the fifth-largest commercial airport in the U.S., in 2008. After having worked as a practicing architect for 20 years, Day previously served as Executive Director of Los Angeles World Airports, the agency that manages Los Angeles International Airport, Ontario International Airport, Van Nuys Airport, and Palmdale Regional Airport.



Fred Dixon
CEO,
NYC & Company

Dixon has run New York City's official marketing, tourism and partnership organization since March 2014. With more than 23 years of experience in the travel industry, Dixon has the overall responsibility for developing and implementing New York City's tourism and convention development strategy internationally as well as in domestic leisure and business markets.



Nancy J. Friedman
Founder,
Nancy J.
Friedman PR

An industry thought leader, creative pioneer, and award-winning strategist, Friedman's PR agency, Nancy J. Friedman PR, has launched more than 60 hotels. Previously head of PR for Ian Schrager and Steve Rubell, Friedman is an active member of the Society of American Travel Writers.



Nick Gray
CEO,
Museum Hack

Nick Gray is the founder and CEO of Museum Hack, a company of educators and actors that give renegade tours at the best museums in the world. Companies in NYC regularly hire Museum Hack to produce their company team building offsites and employee training. Gray's mission and that of Museum Hack is to get people excited about the best Museums all around the world.

S P E A K E R B I O S



Alice Gray Stites
Chief Curator,
21c Museum
Hotels

As Chief Curator and Director of Art Programming for 21c, Stites collaborates with founders Laura Lee Brown and Steve Wilson to curate exhibitions and oversee art programming for all 21c locations. After earning a Master of Arts degree from Columbia University, Stites worked in various editorial roles for Arts & Auction, Contemporanea and ARTnews magazines in New York before becoming adjunct curator of contemporary art for the Speed Art Museum.



Craig Greenberg
President,
21c Museum
Hotels

Part of 21c Museum Hotels since its founding, Greenberg oversees the daily operations of the company including the management of all 21c properties and the development of 21c in new markets. Prior to joining 21c Museum Hotels, Greenberg was an attorney with Frost Brown Todd, where he managed an ancillary business dedicated to securing and deploying New Markets Tax Credits.



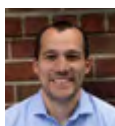
Paul Hennessy
CEO,
Priceline.com

Hennessy became Chief Executive Officer of Priceline.com in April 2015 after previously serving as Chief Marketing Officer of Booking.com, the Priceline Group's global Amsterdam-based brand. Prior to Priceline, he served as the Head of Consumer Marketing at the GSM wireless startup, Omnipoint Communications, and General Manager of Marketing at PT Exelcomindo Pratama, a Verizon joint venture in Jakarta.



Sasha Hoffman
CEO,
Fuzzy Compass

Sasha Hoffman is the Chief Executive Officer of Fuzzy Compass, a travel startup turning the world's top travel influencers into modern-day travel agents. She was formerly COO of Piaggio Fast Forward, a development partner of Piaggio Group and a pioneer in lightweight transportation. Prior to that, she was Head of Business Development for PlastiQ, a venture-backed payments startup, an investment banker in the technology group at Goldman Sachs and Lehman Brothers and started a luxury handbag company.



Greg Hong
CEO,
Reserve

Hong is Reserve's CEO, Co-Founder and Board Director, responsible for setting and executing the vision for the company. Prior to starting Reserve, Greg was a small business consultant and the Director of Business Operations at true[X], where he ran their ad operations team from pre-revenue to \$20 million.



Mark Hoplamazian
CEO,
Hyatt Hotels

Hoplamazian has served as President and Chief Executive Officer of Hyatt Hotels Corporation since December 2006. Prior to being appointed to his present position, Hoplamazian served as President of The Pritzker Organization. He is also a member of the World Travel & Tourism Council.



Jeremy Jauncey
Founder,
Beautiful
Destinations

Jauncey is a serial technology entrepreneur and the founder of Beautiful Destinations. He is also the co-founder of Tictrac, a digital health company that uses data to engage individuals in their health, a fellow of the British American Project and deal maker with U.K. Trade & Investment's Global Entrepreneur Program services.



Issam Kazim
CEO, Dubai Corpo-
ration for Tourism
and Commerce
Marketing

Kazim is the Chief Executive Officer of Dubai Corporation for Tourism and Commerce Marketing, the body responsible for the branding, promotion and marketing of the Emirate of Dubai. Issam took up this post in February 2014, joining the DTCM from the Dubai World Trade Centre (DWTC), where he was the Director of DXB Live, a subsidiary of DWTC.



Geoffrey Kent
CEO,
Abercrombie &
Kent

Under Kent's leadership, Abercrombie & Kent offers 350 tours and expeditions in more than 100 countries across seven continents. Kent is a founding member of the World Travel & Tourism Council, who has played key roles in tourism development initiatives at the UN and elsewhere. Kent was also the first individual to travel by motorbike between Kenya and Cape Town, South Africa.

S P E A K E R B I O S



Michael Klein
Head of Industry
Strategy,
Travel & Retail
Adobe

Michael Klein is the Head of Industry Strategy, Travel & Retail at Adobe. He leads a team of subject matter experts who work with Adobe's travel and retail clients to help them develop best-in-class digital marketing strategies. Michael regularly contributes thought leadership to industry events, and is an active member of Shop.org and the Global Retail Marketing Association.

Prior to joining Adobe, Michael spent more than 25 years as a Senior Merchant and Marketer for brands such as the LVMH Group (eLuxury.com), William-Sonoma, Harry & David, Discovery Channel Stores, and wine.com.



Craig Kreeger
CEO,
Virgin Atlantic

Kreeger was appointed CEO of Virgin Atlantic Airways in 2013. Previously, he had a 27-year career at American Airlines, spanning commercial, financial and strategic roles in the U.S. and around the globe, including six years in London as SVP, International.



Josh Lesnick
CMO,
Wyndham Hotel
Group

Lesnick serves as Executive VP and Chief Marketing Officer at Wyndham Hotel Group, responsible for all aspects of marketing and revenue generation for the company and its 15 worldwide brands. Previously he was President and Chief Executive Officer of Audience Rewards, as well as spending nearly two decades working in the hospitality industry in executive leadership roles with Starwood Hotels and Hyatt Hotels.



Vinicius Lummertz
President,
Brazilian
Tourism Board
(Embratur)

One of the first challenges Lummertz will have as president of Embratur is to lead the process to modernize the local authority management model, under the direction of Minister Henrique Alves. As head of the Policy Secretariat, he also managed the creation of the National Tourism Plan, a reference document for the sector which helped boost the country's tourism potential. Lummertz holds a BA in Political Science from the American University of Paris, a graduate degree from Harvard University and a degree from the University of Lausanne.



Jonathan Mildenhall
CMO,
Airbnb

Mildenhall is a global thought leader in creativity, business strategy and marketing excellence. Prior to becoming the Chief Marketing Officer of Airbnb in June 2014, he was the SVP of Integrated Marketing Communication and Design Excellence at The Coca-Cola Company, where he was responsible for leading the creative vision and strategy for its portfolio of global brands.



Gillian Morris
CEO,
Hitlist

Gillian Morris is the co-founder and Chief Executive Officer of Hitlist, a personalized mobile travel agent. The app has been recognized as a 'Best New App' by the iTunes app store and was named one of the best apps of 2014 by The Next Web. Before entering the startup world, Gillian worked as a consultant, journalist and educator in Turkey, China, the Gulf states, and Syria. Her work has appeared in/on the New York Times, Harvard Business Review, CNN, CNBC, TechCrunch, The Next Web and LifeHacker. She is based in New York where she serves on the Executive Board of Harvard in Tech.



Edie Rodriguez
CEO,
Crystal Cruises

In May 2015, Edie Rodriguez was promoted from President and Chief Operating Officer of Crystal Cruises to President and Chief Executive Officer, where she oversees the company's expansion to encompass a new fleet of ships in what is considered to be the largest expansion in history for any luxury brand by the travel and hospitality industry. Rodriguez brings with her 34 years of experience working in the international cruise, travel and technology industries.



Diego Saez-Gil
CEO, Bluesmart

Diego Saez Gil is the Chief Executive Officer and co-founder of the smart travel goods startup Bluesmart, which created the world's first self-tracking, connected luggage. Prior to Bluesmart, Saez-Gil co-founded mobile travel startup WeHostels that was acquired by StudentUniverse in 2013, where he became Vice President of Mobile.



Kevin Shinkle
Chief
Communications
Officer,
Delta Air Lines

Shinkle is Senior VP and Chief Communications Officer responsible for external communications, media relations and employee and cross-divisional communications throughout Delta's global system. Previously, he was a business editor at The Associated Press, managing coverage of economic, business and financial news with a team of more than 70 editors and reporters in the U.S., Europe and Asia.

S P E A K E R B I O S



Michael Small
CEO,
Gogo

Small has served as Gogo's President and Chief Executive Officer and as a member of the Board since 2010. Prior to joining Gogo, Small served as the Chief Executive Officer and Director of Centennial Communications Corporation, Executive Vice President and Chief Financial Officer of 360 Degrees Communications, and President of Lynch Corporation.



James Smith
EVP Americas,
Criteo

James Smith is the EVP of the Americas at Criteo, the leading performance marketing technology company. James is responsible for managing all sales and operations throughout North and South America. Before to Criteo, James spent eight years as CRO of several successful startups, including Verve Mobile, Flixster and The Huffington Post



Ivanka Trump
EVP, Development
& Acquisitions,
Trump Hotel
Collection

Ivanka Trump is charged with the domestic and global expansion of the company's real estate interests, directing all areas of the company's real estate and hotel management platforms. In addition to her work at The Trump Organization, Ivanka Trump is the founder of Ivanka Trump Fine Jewelry, with boutiques in SoHo, New York and Beijing and also sold through luxury independent jewelers and department stores across the globe.



Zim Ugochukwu
CEO,
Travel Noire

Ugochukwu created Travel Noire as a comprehensive end-to-end travel resource for unconventional travelers of color, connecting members of the African diaspora with the world of travel. After cloning a gene at the age of 19 and becoming the youngest appointed precinct judge for the state of North Carolina, she was named one of the 25 Young Women Changing the World by Glamour Magazine.



Matthew Upchurch
CEO,
Virtuoso

Upchurch is the CEO of Virtuoso, a multi-billion-dollar, by-invitation-only enterprise of travel advisors and travel providers. Two family businesses, Percival Tours and Upchurch Travel, enabled him to wear the hats of supplier and travel advisor simultaneously, ultimately leading to his vision of Virtuoso: a virtual corporation of upscale travel agencies supported by centralized marketing vehicles and exclusive agreements with travel suppliers around the world.



Camilla Vasquez
PHD,
University of
South Florida

An expert on language use and interaction in online and offline settings, Vásquez teaches and conducts research at the University of South Florida. She is the author or The Discourse of Online Consumer Reviews (Bloomsbury, 2014), the first book-length study of online review language, and she blogs about online reviews at: researching-digitalmedia.com.



Craig Vosburg
CPO,
MasterCard

Craig Vosburg is the Chief Product Officer for MasterCard. In this role, he leads the development, commercialization and management of payment solutions that create a sustainable competitive advantage for MasterCard and its customers. The Core Products group is responsible for Consumer Credit and Debit, Commercial, Prepaid, and Loyalty Solutions. Vosburg is also a member of MasterCard's global Operating Committee.



Darrell Wade
CEO,
Intrepid Group

Wade is the co-founder of Intrepid Travel and CEO of The Intrepid Group, the world's largest provider of adventure travel experiences. His achievements include being selected as one of the first group of Australians to complete Climate Project training with the Hon Mr Al Gore, winning the NAB Smart Company Award and being named the Ernst & Young Entrepreneur of the Year in 2002 (along with Geoff Manchester).



Rick Wise
CEO,
Lippincott

Rick Wise is CEO of Lippincott, a creative consultancy. He oversees all aspects of Lippincott's offerings, which integrates the disciplines of strategy, design, innovation, and organizational engagement. He advises clients on their toughest branding challenges and has led engagements for some of the world's biggest brands such as Coca-Cola, Hershey, GE, General Motors, Johnson Controls, Walmart, and others.

SPONSOR WORKSHOP

LUNCH & LEARN

At this year's conference, we've invited two sponsors to host travel trends workshops.

Each session is a 30-minute intensive, deep-dive discussion addressing new ideas and challenges in travel, with a Q&A at the end. The sessions are designed to be interactive, with a focus on leaving you with new strategies to implement for your own business or clients.

Each session allows for just 50 participants, and takes place during lunchtime. Lunch will also be served in the workshop area.

For those worried about missing a networking opportunity in the main lunch area, know that lunch is a full hour and a half this year, giving you plenty of time to take part in a workshop session with opportunities to network before and afterwards.

AT SKIFT FORUM WORKSHOPS

SPONSOR WORKSHOP

DAY 1



The Connected Traveler: How Digital is Transforming the Traveler Experience

presented by Mindtree

The travel experience is in the midst of a massive transformation due to rapid advances in digital technology. But what does Digital actually mean? Is it more than just social, mobile, analytics and cloud? In the era of the Connected Traveler, travel brands are faced with a need to find their digital edge to stay competitive. This session will discuss the keys to a successful digital transformation for travel & hospitality companies and give insights for how to best address the Connected Traveler.

Speakers:

Paul Gottsegen, Chief Marketing and Strategy Officer, Mindtree

Scott Nason, Travel, Transportation and Hospitality Consultant and retired Vice President, American Airlines

What you'll learn:

- + How organizations can effectively engage the hyper-connected traveler.
- + How to leverage technology and collaborate with other players in the travel ecosystem.
- + How to turn data into actionable insights.

DAY 2



Engaging Travelers with Personalized Messaging

presented by Underline Communications

Armed with insights from American Express research into consumer traveler attitudes and expectations, Brian Lenhart, Director of American Express Travel, and Luke Daigle, Principal of Underline Communications, will share a fascinating case study of how they transformed an email marketing program from a static blast into a highly personalized communication to meet the needs of the modern traveler.

Speakers:

Luke Daigle, Director, American Express Travel,
Brian Lenhart, Principal, Underline Communications

What you'll learn:

- + Insights into customer experience and expectations.
- + How to connect and engage with today's highly fragmented traveler.
- + Correlations between customer attributes and travel preferences.

Door & Registration Open 7:30AM

Breakfast 7:30AM-8:30AM

9:00AM-9:30AM

Opening Introduction,
The Fault Lines of Disruption In
The Global Travel Industry
Rafat Ali, Founder/CEO, Skift

9:30AM-9:50AM

Reversing Your POV: A New
Perspective on Hospitality
**Mark Hoplamazian, CEO,
Hyatt Hotels**

9:50AM-10:05AM

Future of Tourism Marketing for
Iconic Tourism Brands
**Fred Dixon, CEO,
NYC & Company**

10:05AM-10:25AM

The Happiness Halo:
The Unexpected Benefits From
Applying Behavioral Science to
Experience Design
Rick Wise, CEO, Lippincott

10:25AM-10:45AM

Understanding the Socio-Cultural
Impact of Travel on Societies
**Geoffrey Kent, Founder/CEO
Abercrombie & Kent**
**Moderator: Wendy Perrin,
Founder, WendyPerrin.com**

Networking Break 10:45AM-11:05AM
sponsored by Yahoo!

*** 11:05AM-11:15AM
Special**

Hate Selling: A Love Story
A Sketch by Skift Comedy Troupe

11:15AM-11:30AM

Building a Travel Company Using
Crowd Funding
**Diego Saez-Gil, CEO/Co-founder,
Bluesmart**

11:30AM-11:45AM

Loudsourcing: The Inside World
of Online Reviews
**Camilla Vasquez, Ph.D.,
University of South Florida**

7 11:45AM-12:05PM

Why the Right Kind of Travel
Agent Survived and Thrived
**Matthew Upchurch, CEO,
Virtuoso**

12:05PM-12:20PM

**Brand Talk sponsored by:
MasterCard**
To Make Cities Better and
To Make Better Cities
**Craig Vosburg, CPO,
MasterCard**

Lunch 12:30PM-2:00PM

**Workshop sponsored by:
Mindtree**
The Connected Traveler: How
Digital is Transforming the
Traveler Experience
**Paul Gottsegen,
Chief Marketing and Strategy
Officer Mindtree**
**Scott Nason, Tourism and Hos-
pitality Consultant and Retired
VP, American Airlines**

8 2:00PM-2:20PM

Reinventing The Business of Tours
For Experiential Travel
Darrell Wade, CEO, Intrepid Group
**Moderator: Jason Clampet,
Co-founder, Skift**

9 2:20PM-2:40PM

The Future of City Branding
**Issam Kazim, CEO,
Dubai Corporation for Tourism &
Commerce Marketing**

10 2:40PM-2:55PM

Art, Culture & the Experience Econ-
omy: Learning is the New Luxury
**Craig Greenberg, President
and Alice Gray Stites, VP,
21c Museum Hotels**

11 2:55PM-3:10PM

Why Visuals are the New Language
of Engagement for Consumers
**Jeremy Jauncey, Founder,
Beautiful Destinations**

3:10PM-3:20PM

**Brand Talk sponsored by:
Adobe**
Creating the Next Golden
Age of Travel
**Michael Klein, Head of Industry
Strategy, Travel & Retail, Adobe**

Networking Break 10:45AM-11:05AM
**sponsored by National
Geographic Unique Lodges
of the World**

12 3:40PM-3:55PM

Building an Airport for the
Future of Travel
**Kim Day, CEO,
Denver International Airport**

13 3:55PM-4:20PM

Building a Culturally Relevant
Brand By Changing The
Cultural Discussion
Jonathan Mildenhall, CMO, Airbnb
**Moderator: Rafat Ali, Founder/CEO,
Skift**

4:20PM-4:30PM

Brand Talk sponsored by: Amadeus
A Conversation About the
Future of Travel
**Scott Alvis, CMO, Amadeus and
Rafat Ali, Founder/CEO, Skift**

14 4:30PM-4:55PM

Why Conversion is the Most
Important Metric in Travel
Paul Hennessy, CEO, Priceline.com
**Moderator: Dennis Schaal,
News Editor, Skift**

4:55PM-5:00PM

**Closing Remarks:
Skift Founders: Rafat Ali,
CEO and Jason Clampet,
Head of Content**

5:30PM-9:00PM

**VIP Cruise
Sponsored by Hornblower
Cruises, Adobe & SapientNitro**
Ticket Holders Only

Door & Registration Open 7:30AM

Breakfast 7:30AM-8:30AM

9:00AM-9:30AM

Day One Recap and
Day Two Introductions
Rafat Ali, Founder/CEO, Skift

15

9:30AM-9:50AM

How to Build an Airline Brand
by Not Participating in the
Premium Rat Race
**Craig Kreeger, CEO,
Virgin Atlantic**
**Moderator: Henry Harteveldt,
Founder,
Atmosphere Research Group**

16

9:50AM-10:10AM

Why Obsessing Over Details
is the Only Way to Build a
Hospitality Brand
**Ivanka Trump, EVP,
Trump Organization**
**Moderator: Greg Oates,
Senior Editor, Skift**

17

10:10AM-10:30AM

Building a Tourism Brand
Around Big Events
(World Cup & Olympics)
**Vinicius Lummertz, President
Brazilian Tourism Board
(Embratur)**

Networking Break 10:30AM-10:50AM

18

10:50AM-11:05AM

Reinventing Cruises Through
Exclusivity and Customization
**Edie Rodriguez, CEO,
Crystal Cruises**

19

11:05AM-11:25AM

The Right Way to Talk to
Different Demographics Across
the Guest Journey
**Keith Barr, CCO,
InterContinental Hotels Group**

20

11:25AM-11:40AM

On the Importance of Middle
America that Travel Brands Ignore
**Josh Lesnick, CMO,
Wyndham Hotel Group**

21

11:40AM-12:05PM

Changed Nature of Travel PR &
Communications in a Digital
First World
**Kevin Shinkle, SVP,
Delta Air Lines**
Nancy J. Friedman PR
**Moderator: Rafat Ali, Founder/
CEO, Skift**

12:05PM-12:15PM

**Brand Talk sponsored by:
Travel Channel**
Moving Images: Upping the
Creative Game in Travel Video
**Ross Babbit, SVP Programming,
Travel Channel**

Lunch

12:30PM-2:00PM

**Workshop sponsored by:
Underline Communications**
Engaging Travelers with
Personalized Messaging
**Luke Daigle, Principal,
Underline Communications**
**Brian Lenhart, Director, Digital
Marketing, American Express
Travel & Lifestyle Services**

22

2:00PM-2:15PM

The Growth Hacks that Turned
Startups into Giants
**Sasha Hoffman, CEO,
Fuzzy Compass**
**Gillian Morris, CEO/Co-founder,
Hitlist**

23

2:15PM-2:35PM

The Evolution of the Travelogue,
1950's and Into the Future
**Chris Collins,
Executive Producer & Co-Founder,
Zero Point Zero**

24

2:35PM-2:50PM

Why Dining and Food is the Next
Frontier of Disruption in Travel
**Greg Hong, CEO/Co-founder,
Reserve**

25

2:50PM-3:10PM

On the Growing Global
Community of Black Travelers
**Zim Ugochukwu, Founder,
Travel Noire**

3:10PM-3:20PM

**Brand Talk sponsored by:
Criteo**
How the Mobile Revolution is
Disrupting the Travel Industry
**James Smith, EVP, Americas,
Criteo**

Networking Break 3:20PM-3:40PM

sponsored by Sabre

26

3:40PM-4:00PM

Emerging Worlds of Corporate
and Leisure Travel
**Ninan Chacko, CEO,
Travel Leaders Group**
**Moderator: Andrew
Sheivachman, Reporter, Skift**

27

4:00PM-4:25PM

Digital Habits of Air Travelers
and What Brands can Learn
From Them
Michael Small, CEO, Gogo
**Moderator: Henry Harteveldt,
Founder, Atmosphere Research**

28

4:25PM-4:45PM

Creative Chaos:
The New Future of Travel
**Nick Grey, Founder/CEO,
Museum Hack & Company**

4:45PM-5:00PM

Closing Remarks
Skift Founders: Rafat Ali, CEO
and Jason Clampet,
Head of Content

Closing Reception 5:00PM-6:00PM

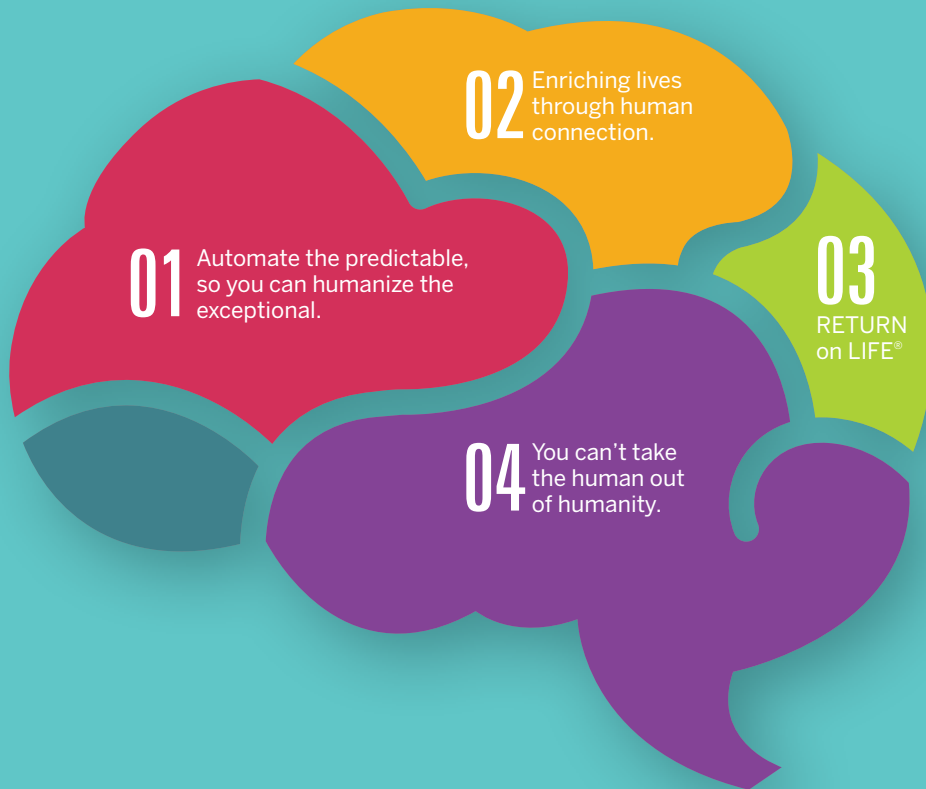
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DEFINING THE FUTURE OF TRAVEL

Program, Schedule, Topics, Speakers

VIRTUOSO'S TAKE



THE SKIFT TAKE

01 Ubiquity of information means everyone's an expert; thus, need for deeper connection beyond digital.

02 Travelers want deeper experiences (inspiration, personalization, self-discovery).

03 Travel brands re-imagine themselves as lifestyle connoisseurs.

04 Travel innovation is not just tech.



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