Get ready for

Destination X

Win traveler trust and
loyalty in the post-booking
ancillary game

aMaDEUS

✉ mobile@amadeus.com

🌐 amadeus.com/DestinationX

#AmadeusDestinationX

🐦 @AmadeusITGroup

in AmadeusITGroup

" We are living in truly fascinating times . "

A century ago, the Second Industrial Revolution was in full roar with sweeping technology breakthroughs that not only redefined our culture, but also reshaped consumerism in every industry. Fast forward to today – we are living in a similarly transformative period. Once again, technology is a tour de force that shapes and sculpts our world – especially when it comes to how every one of us travels around it.

In the days of pre-internet and certainly pre-mobile internet, the traveler happily accepted suggestions about where to go and what to do from their travel agency or other supplier. In the Information Age, travelers now demand immediate knowledge that goes beyond the status quo; they become easily frustrated when they cannot access critical information in an instant.

Travelers now say, "I don't want to be just a tourist." Digital access to local content whenever, wherever is changing how business travelers and leisure goers consider and book ancillary destination services. That's why the right mix of mobile-oriented ancillary destination content for the traveler needs to be intertwined with the purchase flow and servicing mix regardless of channel. Any service that does this plus appreciates who individual travelers are, allowing for diversity and multi-interest sets, will win.

Michael Bayle,
Executive Vice President for Mobile, Amadeus

Introduction

Tick tock. Your trip has already begun. Perhaps you are still wondering how the rest of your trip details are going to come together. Or you would like to know what else you could experience to make your time in a new or slightly familiar place all-the-more richer. If you are a business traveler, how will you wow the client and impress your boss with a unique dining experience or share a special team building moment with a colleague? If you are a leisure goer, how should you make the most of your limited time and budget to "feel like a local" and make family and friends envious of your Instagram feeds? If you are a 'bleisure'-minded Millennial, how do you achieve both of these goals every time you travel?

According to PhocusWright, the market for travel activities will likely reach $183 billion by 2020.[1] Deloitte also reports that travel is outpacing demand for physical goods with 'Experiential spending on recreation, travel, and eating out trending up'.[2] Interest in traveling and exploring our world has never been greater. But with time in short supply and a myriad of fragmented service options, the pressure is on once travelers arrive at their destination. Now, more than ever, it is critical to understand the largely untapped and dynamic destination services marketplace, which we refer to as *Destination X*. As part of our research into this area, Amadeus conducted a global survey with over a thousand CheckMyTrip application users to explore traveler ancillary needs within *Destination X*, and identify the services and content they require in order to make their travel experiences seamless and truly "stress-free."

We gathered expert opinions on our survey findings from leading destination service brands in dining, taxi & transfer, activities & tours, parking and insurance & compensation areas, which are part of the Amadeus Mobile COLLECTIVE community. Together, these insights further revealed eight key trends unfolding around *Destination X* where technology, especially mobile, can help travel sellers achieve a new level of traveler loyalty and revenue growth.

What you will learn from our study

• The opportunities and challenges arising from within the *Destination X* marketplace
• The role mobile and other emerging digital channels will play to help travelers in their journey
• Recommendations to meet traveler ancillary destination needs and gain their trust and loyalty

Destination X awaits all of us

Business professionals depend on us for their productivity when they travel. Leisure goers rely on us to make their trips memorable. Bleisure-oriented Millennials and the next generation of travelers that follow expect us to help them achieve both. We must be prepared to meet every traveler and satisfy their ancillary needs in *Destination X*. Read on and discover more behind the exciting challenges and opportunities that await our industry in this emerging part of the Live Travel Space.

[1] 'Travel Activities Market to Reach $183 Billion by 2020' (2017), Phocuswright <https://www.phocuswright.com/Travel-Research/Research-Updates/2017/Travels-Tours-and-Activities-Market-to-Reach-US183B-by-2020> [date accessed: 06.02.19]

[2] '2018 Travel and Hospitality Industry Outlook' (2018), Deloitte <https://www2.deloitte.com/ro/en/pages/consumer-industrial-products/articles/2018-travel-and-hospitality-industry-outlook.html> [date accessed: 06.02.19]

Executive Summary

Take a skim through our Key Trends

1. Destination services make or break the trip

70% of surveyed travelers told us that ancillary destination services either made their trips more or less productive and enjoyable or were the linchpin of their entire trip experience. However, their ability to quickly tap into these destination services is a complexity of frustration.

2. Travelers are underserved in *Destination X*

Nearly a quarter of surveyed travelers say they lack time in-destination to plan their experiences. The 'lack of time' challenge travelers face is further exacerbated by not being able to access the ancillary destination services they need on their mobile devices. Moreover, 10% of our respondents told us they are not getting sufficient guidance from their travel agency, employer or air/hotel supplier.

3. Business and leisure travelers have similar values, but different priorities

When asked which ancillary destination services matter most, business and leisure travelers reflected interesting similarities in terms of types of services they crave. However, the differences in priorities and quantities were striking. Both sets of travelers typically book 1-2 services per trip.

4. Complementary service is the new name of the ancillary travel game

A majority of travelers from our study welcome proactive information or offers about other complementary destination services when booking their air/hotel or a single destination service.

5. In pursuit of the perfect personal touch

More than half of travelers want travel brands to tailor destination content and shopping flows to their preferences and previous behaviors.

6. Less hunting around, seamless access is a must

Travelers demand in-destination support at the touch of their mobile screens. A single mobile point of access is still their biggest pain point, followed by trustworthy reviews and restrictions.

7. Travelers seek more inclusivity

With all the focus on younger travelers, segments with additional accessibility needs are feeling left out. Some of our respondents reported that security/safety were big issues too.

8. Anticipating traveler nirvana

Nearly 20% of surveyed travelers seek coordinated access via apps, chat, voice and web. Voice and artificial intelligence could be the keys to winning in *Destination X*.

Contents

Destination services make or break the trip

Slam. You're in the car, racing to catch your flight. There's a dozen things whirling through your mind, you wish you had time to better organize dinner for your boss and that potential new client. Was that restaurant a good choice? Will the food be okay? Did you even pack your charger? It's too late now. There's no time to fix anything before you land in *Destination X*.

Going away, for business or pleasure, can be stressful and it's easy to see why. From the fear of returning home to an overflowing inbox to simply finding enough time to pack and prepare for a trip, travel takes time – and our daily lives are under greater time constraints than ever before.

The scenario above is a familiar one for many people. There's so much to do, so much to consider, and so much that can go wrong. A recent poll of 1,000 workers found that even just the prospect of time away made 73% of employees anxious and our own research further proves just how demanding a trip away can be.[3]

"The consumer is hungry – to understand where they're going and what is there."

Valentina Moise
Commercial Director, ParkCloud

Feeling the pressure

nearly 1/4 of respondents admit to feeling frustrated in the time leading up to making the travel booking.

a further 18% begin to feel frustrated in the days and weeks after booking.

For nearly half of respondents, stress levels peak on the day of departure.

Travelers want to do more - in less time

Despite having minimal time to research the trip, travelers are determined to make the most of every moment away; a third of Millennials say being able to share travel snaps on social media is just as important as the holiday itself.[4] To offer both detailed planning and the excitement of spontaneity, destination services need to up their game.

Our research shows how essential ancillary destination services are to a trip and, understanding their pivotal role, just how quickly these services have developed to offer travelers the ultimate experience abroad. According to our survey, 93% of travelers now consider ancillary destination services to be an important part of their overall travel experience with 40% of these travelers specifically believing ancillary destination services make their trips more productive and enjoyable.

So how did add-on destination services come to play such an important role? Airbnb recently surveyed Millennials from around the world to assess their financial priorities, shedding light on how this age group is thinking, living, and spending. Airbnb's research found that rather than buy a house or pay off debt, over the next five years most Millennials simply want to travel. Over 80% of those surveyed by Airbnb believe the best way to discover and learn about a place is through local experience – and they're relying on destination services to open up their world.[5]

"Travelers demand more variety and insight into their destinations - they want real insider knowledge. At a time when there is massive over-tourism they seek a more authentic experience, experiences that take them off the beaten track. They expect real local knowledge."

Paloma Salmeron Planells
Head of Communications, AirHelp

"For even the most frequent traveler the transfers to and from the airport are an added pressure, with unpredictable factors such as delays. We have integrated flight arrival times so if there is a delay pick up times are automatically adjusted so the driver is waiting upon arrival, providing a seamless traveler experience."

Henry Joseph-Grant
Chief Commercial Officer, Talixo

A world without destination services isn't worth traveling...

1/3rd of travelers surveyed said destination services can 'make or break' a trip.

To plan or not to plan?

We've seen how additional destination services can alleviate pre-travel stress by ensuring your itinerary is watertight before you even board your flight. This approach is ideal for the two-thirds of our respondents who prefer to plan ahead (even if they never find the time to actually do so).

Destination services also, uniquely, meet the needs of the "just in time" traveler. These are the people who say, "Why plan ahead?". A quarter of our survey respondents feel more spontaneous once they've arrived in *Destination X*, suggesting that successful spur-of-the-moment ventures make them more likely to plan other trips. These travelers are looking for a truly spontaneous adventure and, clearly, destination services can provide that experience.

45% of travelers in our survery now say their mobile browser is the first place they go to discover what's out there and 41% are also using it to book their destination services. It goes without saying that mobile is transforming the way in-destination travel opportunities are accessed and enjoyed.

Fast, simple, and on-the-go internet access makes impromptu planning easier than ever before. Around 25% of respondents book destination services the day before travel, en route, or once they've arrived at their destination. Regardless of pre-travel stress, there's a definite willingness among many travelers to let mobile destination services fuel their "let's see what happens" holiday or brief leisure moment during a business trip.

Our view

"Some travelers feel comfortable planning everything in advance, but many keep an open mind so they can make purchase decisions on the go and when they see things. There is a real opportunity for travel agents, corporate travel programs and other providers in the areas of flights, hotels and cars, to continue their servicing of the traveler once at their destination."

Michael Bayle
Executive Vice President for Mobile, Amadeus

3 The Institute of Leadership & Management, Summer Holiday Stress,
<https://www.institutelm.com/resourceLibrary/summer-holiday-stress.html> [accessed 23.01.19]

4 WeSwap, From Looking to Booking: How Social Media Is Taking Over Tourism (2018), <https://www.weswap.com/blog/travel/social-media-influencing-holiday/> [date accessed: 06.02.19]

5 Airbnb, Airbnb and the Rise of Millennial Travel, 2016
<https://2sqy5r1jf93u30kwzc1smfqt-wpengine.netdna-ssl.com/wp-content/uploads/2016/08/MillennialReport.pdf> [accessed 23.01.19]

Travelers are underserved in *Destination X*

Your flight lands behind schedule. As the airplane taxis to the arrival gate, everyone sitting around you is gazing down, faces illuminated by screens. They're silently browsing their messages and reminders, seeking ideas for where to go, what to do, and how to do it in *Destination X*.

Time is not on travelers' side

Our survey respondents report their stress levels start to rise from the moment they've booked a trip, with almost half of travelers feeling most stressed on the day of departure. Another 24% say they lack time in-destination to plan their experiences. Despite the excitement of going somewhere brand new and escaping the daily grind, the pressure is now on travelers to make the most of every moment while they're away. Anxiety about what to do, the fear of not knowing where to go, and working out how to get places; there's so much to do within a limited time frame and no one wants to waste a single second.
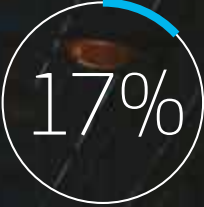
Fragmentation leads to frustration

From securing reliable airport transfers to discovering the best local eats and activities, modern travelers increasingly rely on mobile devices to make planning the local details of their trips easier. Our survey research found that many travelers feel underserved when it comes to discovering and booking destination services - especially upon arrival at their destination.

So why do travelers feel underserved in this area? 27% of our respondents identify having to use multiple apps as the number one frustration when searching for ancillary destination services. 17% also report being unable to easily access destination services once they arrived in *Destination X*.
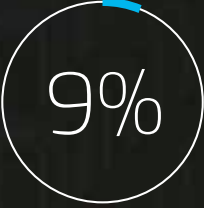
> "We used to work with suppliers that cutoff bookings 24 hours before and that was good enough, but because of mobile we're now working with suppliers that can make bookings one or two hours prior to fulfilling the booking, so this is changing the way we interact with clients, as well as the product we offer."

Alex Rogers
Head of Partnerships, Holiday Taxis

17%
of travelers report being unable to easily access destination services once they've arrived at their destination.

9%
of travelers worryingly say they "always" plan their trip in-destination.

24%
of travelers say they lack time in-destination to plan their experiences, raising a new issue; travelers want to speed up the planning process with destination services, but simply can't access the services they need.

27%
of respondents identified having to use multiple apps as the number one frustration when using destination services for their travels.

"We use algorithms based on the different parameters from the business traveler context and target them with content that avoids, for example, family activities."

Valéry Bernard
CEO and founder, MyLittleAdventure

Travelers need a helping hand

If travelers are struggling to access the destination services they need quickly, efficiently and in-destination, destination service providers need to solve these problems and ensure travelers are able to access the services they need, when they need them.

For a large percentage of today's travelers, filling in the details of their business and leisure trips happens primarily in-destination. However, much of the current destination services available have a ways to go in order to fully deliver on the traveler's complex needs and expectations.

It's clear there is a huge opportunity to build a better relationship between providers and travelers in-destination, especially by improving information accessibility and service availability in *Destination X*. Our destination experts offered a glimpse into some of the changes already underway to improve both the quality of information and the point in time in which salient destination service content can be accessed by travelers.

"We are working on how to make selections more accurate for people based on what we know and what we learn every day, as well as all the data we are collecting on our products and other customer touchpoints. We then use this to enrich our customer knowledge and personalise our restaurant recommendations to each of our customers."

Guillaume de Lacroix
CMO, The Fork

Our view

"Fifty percent or more of a traveler's itinerary could easily be spent beyond their air bookings, revealing a goldmine where technology can play an even bigger role."

Michael Bayle
Executive Vice President for Mobile, Amadeus

# Business and leisure travelers have similar values, but different priorities

You're squeezed into a shared cab, heading into the city center – it's not quite what you expected. As you crawl through rush hour traffic, you're trying to coordinate last-minute team-building dinner plans for a major client. Expectations are high; the ambience and cuisine can't be anything less than perfect in *Destination X*.

When asked which destination services they most valued, business and leisure travelers share similar views. However, we discovered some interesting differences in both the quantities of destination services they book as well as the priority of specific destination service categories between business versus leisure-oriented travel.

Business travelers have an appetite for more services

Comparing the number of ancillary destination services typically booked, over half of respondents report 1-2 for business and the same for leisure trips. Interestingly, the percentage of business travelers booking this amount of services was slightly higher (4%) than those who did so for purely leisure trips, as shown below.

How many Destination Services are booked?

	None	1-2	3 or more
Leisure / Business			
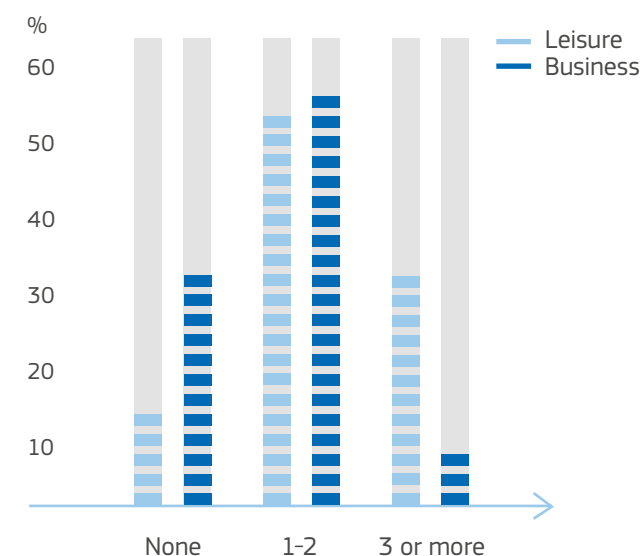
For those typically booking 3 or more ancillary destination services, 34% say they do so primarily for leisure trips, while around 10% book the same amount for a business trip. Conversely, 34% report they do not book any ancillary destination services on their business trips, while only 14% of leisure travelers claim to book none.

Does this mean business travelers aren't interested in more destination services? Maybe. Or perhaps these busy professionals just don't have sufficient time to explore what's nearby and quickly book an ancillary service that increases both their overall productivity and enjoyment.
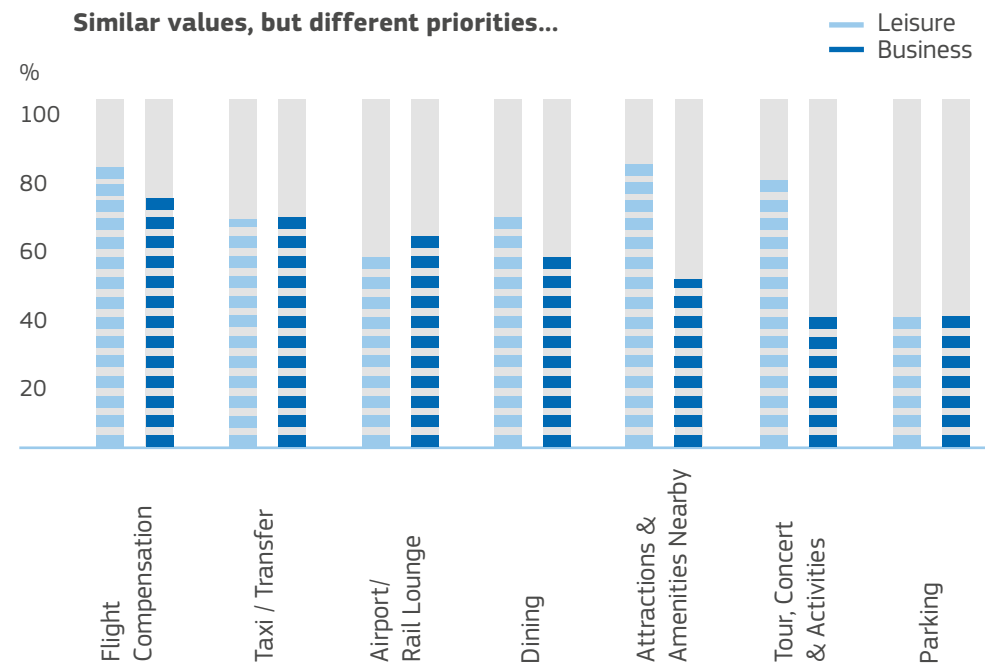
"Corporate and business travel is also changing. There's more emphasis on 'the business traveler' rather than 'the business', and the business traveler is looking to tailor the service based on their own needs."

Valentina Moise
Commercial Director, ParkCloud

Holidaymakers value experiences most of all

For leisure goers, it's not surprising that they cherish in-destination experiences more than actually getting to and from them in *Destination X*. There are, however, striking differences evident in how business and leisure travelers rank the importance of logistical versus the more experiential types of ancillary destination services.

Similar values, but different priorities...

Legend: Leisure / Business

Categories: Flight Compensation, Taxi / Transfer, Airport/ Rail Lounge, Dining, Attractions & Amenities Nearby, Tour, Concert & Activities, Parking

Flight compensation soars

73% of our respondents say flight compensation services are important/very important to their business travel experience, ranking it first in the list of possible destination service categories. Interestingly, around 81% of our survey takers give it the same level of

importance for their leisure travels, placing flight compensation a close second in destination service priorities for leisure travelers. Evidently, tracking down compensation benefits is important to both groups, but those on a holiday may feel they have more at stake.

Taxi & Transfer: Getting to versus being there?

Our survey shows similar numbers of travelers feel pre-booked and last-minute access to taxi & transfer services are important/very important. For leisure travel, the importance of taxi & transfer is slightly less important than more experiential ancillary destination service categories: 'Attractions & Amenities', 'Great Dining', and 'Tour, Concert & Activities'. This finding may reflect a greater reliance by leisure travelers on either rental car or public transportation options to get around in *Destination X*.

Eating well matters to everyone

Three-quarters of our survey respondents think access to great dining services is important/very important on leisure trips. Although the percentage of travelers who place the same importance on dining for business travel is lower (59%), finding a good restaurant clearly still matters when traveling for work. Connecting more travelers with memorable local cuisine for either business or leisure is key to consistently increasing overall trip satisfaction and retaining their loyalty.

Seeing the sights comes out on top

Our survey revealed that 82% of travelers, when not traveling primarily for work, prioritize seeing local attractions and amenities over any other destination service. For business-oriented trips, only 55% of travelers said it was important/very important to their overall experience. Tours, concerts, and activities ranked lower, with almost 40% finding them important/very important compared to almost 75% saying the same for their leisure travels. Enhancing knowledge at the right moment in the journey could play a role in further opening up both of these service categories for all travelers.

Airport/rail lounge access is becoming a factor

As travelers spend more time at airports and rail stations, finding a relaxing haven to catch up on emails, hold discussions or simply take a break in the midst of their trip is paramount for a significant number of travelers. Although slightly higher when it comes to business travels (61%) than leisure holidays (59%), the numbers are close, suggesting that despite different travel purposes, there's a crossover of traveler needs when it comes to lounge services: the business traveler winds down from tough negotiations, while the holidaymaker scans work emails to reduce the pile-up when back at the office.

Parking is of increasing value to all travelers

More than a third of the travelers in our survey say pre-booked and last-minute access to local parking services is important/very important for business as well as leisure trips. Quickly and easily solving parking problems adds value to the overall travel experience by reducing stress and frustration on travel day.

Our view

"Nowadays a traveler is simply someone who leaves his or her comfort zone and goes to a destination that he or she may or may not know. Whether this person's travel is technically business or leisure — it does not really matter. Travel providers still need to service them in the best 'bleisure' way they can."

Michael Bayle
Executive Vice President for Mobile, Amadeus

Complementary services: the new name of the ancillary travel game

Less than fifteen minutes until your sightseeing tour begins and you desperately need a taxi. There's none to be found, the local bus signage is indecipherable, and you're really starting to panic. You notice a young couple hop off rented scooters across the way. After an enlightening chat with them, you are asking yourself, why didn't you think to buy a convenient 3-day all-access ride-share rental pass beforehand? You realize it's these tiny touches that transform both your business and leisure travel from average to amazing in *Destination X*.

The answer to "what now" problems like this could simply be making the traveler aware of available destination services that complement their selection at the moment of booking. For years, companies have been using algorithms to inspire us to engage further with a variety of "complementary goods and services"; Amazon offers books, clothing or other goods you may need or want based on previous purchases, Spotify suggests new songs you might like based on your current favorites.

Importance of complementary services to the overall trip

Very Valuable

Valuable

Somewhat Valuable

Not Valuable

10   20   30   40 %

Our data shows those little extras – finding great places to visit, exceptional places to eat, adventurous things to do – matter a great deal to travelers.

When asked how valuable they would find receiving notifications about other complementary in-destination services, the responses from our survey are clear: mobile-first travelers in business and leisure mode couldn't be more open to them. Nearly three-quarters of our survey respondents say receiving proactive notifications about other ancillary services to complement their trip would be either valuable or very valuable to them.

We've already mentioned that nearly three-quarters of our surveyed respondents say destination services are either very important (30% said 'make or break') or important (40% for 'productivity or enjoyment'), for their travels. From this and the findings above, clearly travelers desire a full package of destination service options; they don't just want the basics, they are asking for their travel counselors to give them more.

How much is too much?

Despite the evidence showing travelers value complementary destination service notifications, there's a delicate balance between benefiting travelers and bombarding them. According to 2017 research conducted by WYSE Travel Confederation assessing what young travelers want most, 37% say they would pay extra for food or drink experiences, 27% said events or festivals, 18% opted for fine or performing arts and 16% chose extreme or adrenaline sports.[6]

This evidence indicates that travelers are always looking for guidance, hints and tips, so it is not surprising the travel industry typically enjoys high open rates for push notifications. But the essential part is targeting each traveler's interests – and avoiding a scattergun approach.

"It's vital that companies offering complementary services work together. We have collaborations with travel companies and car rental companies, and 'at destination' ancillary services such as restaurants, hotels and city tour operators"

Valentina Moise
Commercial Director, ParkCloud
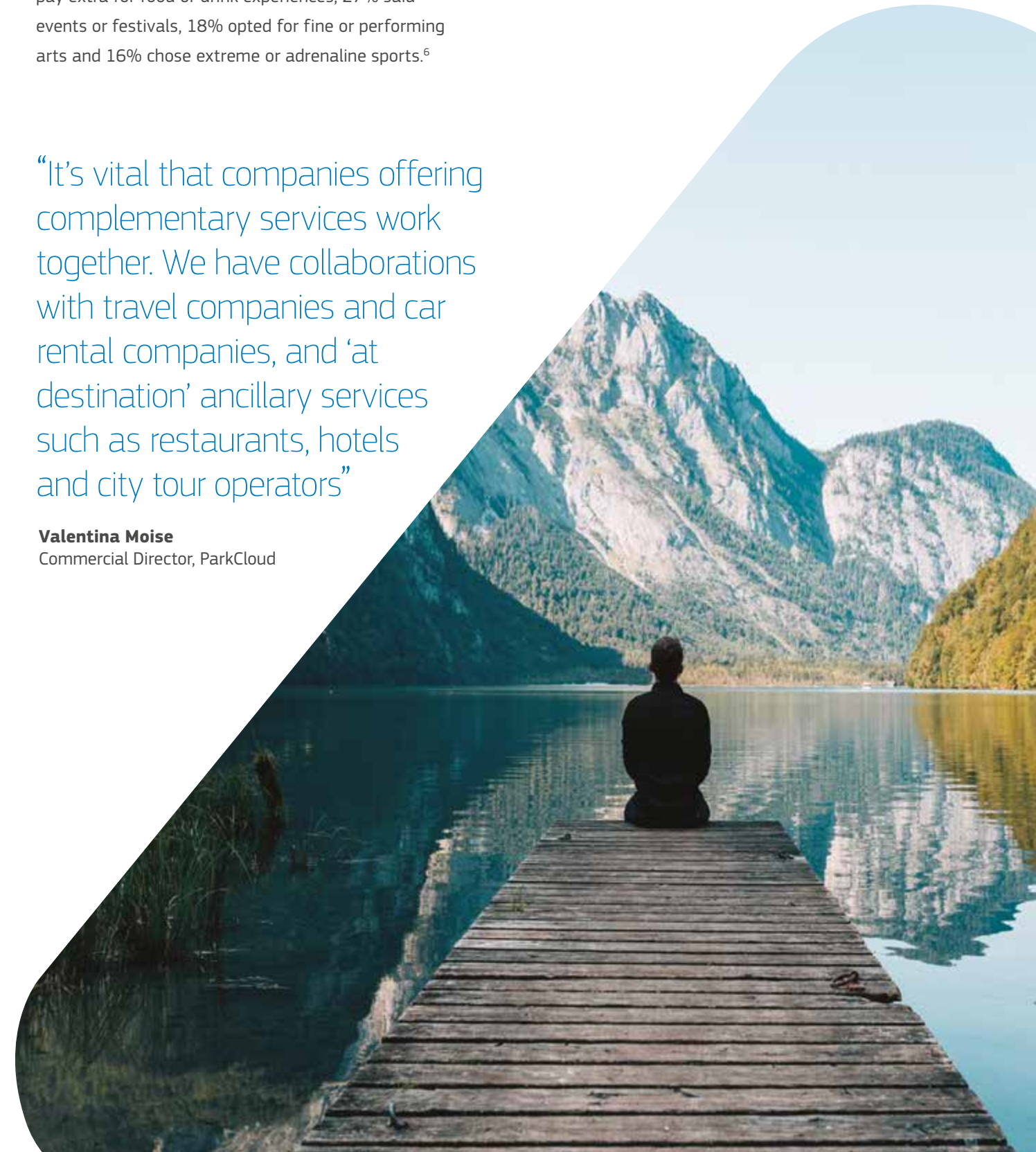
Connection is the secret sauce

Achieving that perfect balance is the arena where ancillary destination service providers now compete. But rather than perfecting the number of push notifications each traveler receives, maybe the answer is in their relevance. If a travel agent, corporate travel manager or other travel provider knows where in their journey a traveler is, what they like and where they're headed, they can offer far more meaningful suggestions and enjoy greater success.

Our data shows a high demand for destination services (34% of leisure travelers book three or more) greatly outnumbering respondents who preferred not to receive notifications or offers, finding them 'too generic'. The ancillary destination service offer's relevance is crucial when time is increasingly in short supply, as one traveler shared:

"Recommendations are important, even if I don't have time to use them."

"We use a lot of technology to create a new experience for our travelers by detecting relationships between products through algorithms to give us a clear picture of what we need to do. Today we are able to generate travel guidance showing the best must do/must see activities in town using algorithms and machine learning."

Valéry Bernard
CEO and founder, MyLittleAdventure

"Transfers are an area which suffers greatly from fragmentation in terms of quality and price, as we work directly with fully licensed, local flights across the world, we have been able to standardize price and offer consistent level of service into tiers that suit all budgets by using yield management technology. What this means for our users is unbeatable pricing that doesn't mean detrimental or poor quality and for our fleet partners, we maximize their earnings by making them more efficient"

Henry Joseph-Grant
Chief Commercial Officer, Talixo

Our view

"Providers are only as successful as the content they have. The challenge, however, is that there is so much fragmentation; often there is no commonality between them, they are completely different tasks. But what you can attempt to do (and we are) is to make best of breed, educated guesses of what we know would frustrate the traveler and at least try to alleviate that."

Michael Bayle
Executive Vice President for Mobile, Amadeus

[6] World Youth Student and Educational (WYSE) Travel Confederation, New Horizons IV (2018), <https://www.wysetc.org/research/reports/new-horizons-series/new-horizons-iv/> [date accessed: 06.02.19]

In pursuit of the perfect personal touch

The chain hotel was either chosen by your boss or recommended by a neighbor; it seems fine at first glance, but the on-site fitness facilities aren't as advertised. You are wondering, would it be safe to go out jogging tomorrow morning alone? Or should you look for a nearby gym, fitness class or group in *Destination X*?

When it comes to travel, the information other people have at their disposal to recommend or even decide something for you is often insufficient. If only brands, companies and service providers knew you better.

Using data to enhance the customer experience isn't new. It's evident in nearly every industry. Why should ancillary destination service provision be any different? Travelers are itching for someone to help them eliminate the guesswork. Only truly personal, made-for-you recommendations will win the day.

Thanks to mobile devices and improving connectivity, modern society is always on – and demanding instant results. As recently as 2010, travelers would plan detailed itineraries simply because they had to. Now, as 5G emerges in Asia Pacific and the USA, apps like Google-owned Waze can give holidaymakers directions in real time.[7/8] The modern 'always on' mindset is hungry to know what's happening and simply has to tap to find out. Forget Fear of Missing Out (FOMO); today's travelers are all about GNOMO: Get Notified or Miss Out.
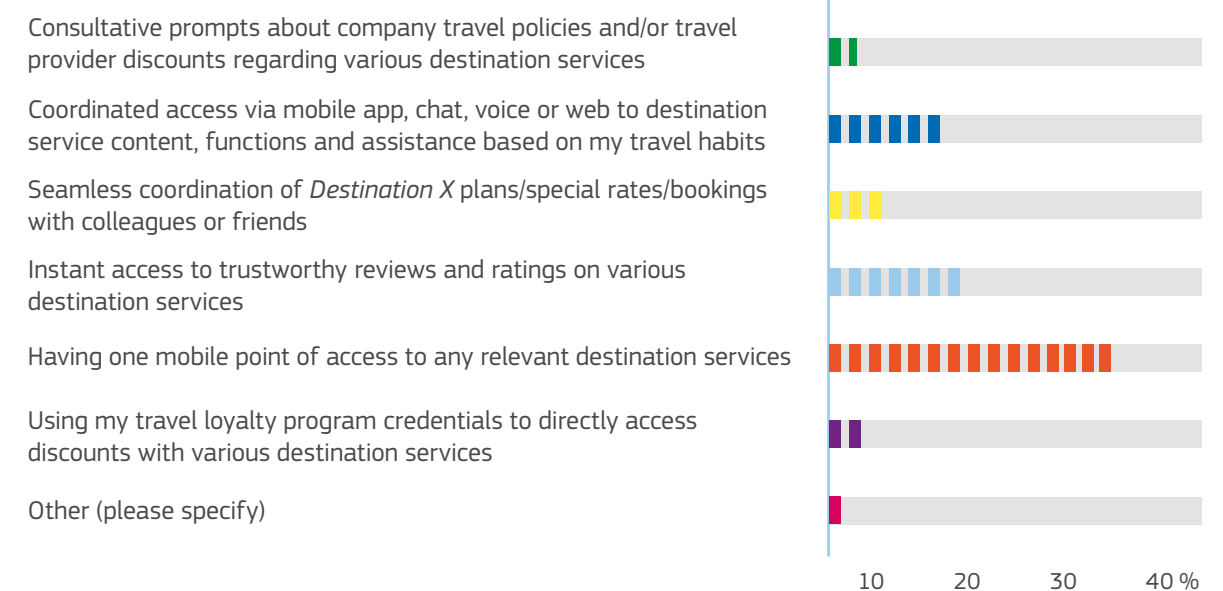
Hit the sweet spot

Research from Google and IPSOS reveals as many as 85% of leisure travelers only decide what to do once they've arrived at their destination.[9]

At the "discovering" stage of their holiday planning, only 5% of travelers told us they wanted push notifications. After booking the trip, the demand for push notifications begins to rise, peaking at 93% of survey respondents saying they would welcome receiving information about other complementary services or offers when they book an ancillary destination service. Plus, 37% told us receiving proactive complementary service information would "truly enhance their trip experience."

The notification's content is just as important as its timing; 60% of travelers told us they would like destination services and/or other travel related brands to tailor information and content based on their previous preferences or behaviors. When travelers see that providers are using data intelligently to offer valuable recommendations, a world of possibilities opens up for everyone in *Destination X*.

But don't intrude...

A great deal of coordination is required in order for personalization to deliver real value in *Destination X*. As the chart below shows, 19% of travelers said they wanted coordinated access (via mobile, app or online) to destination services specifically based on "my travel habits."

Various logical connections can also be made between different categories of ancillary destination services, with some determined by 'opt-in' behaviors and past purchase history. However, other cross- or up-selling connections are increasingly influenced by a traveler's eligibility, which is determined by a set of business rules as well as conversations that took place through their laptop email inbox or preferred mobile messaging app.

This is where the line between helpful, curated suggestions and intrusive ads begins to blur. Excessive recommendations may be ignored, posing an information and communication balance challenge for destination service providers.

Preferred enhancements to make *Destination X* productive & enjoyable

Consultative prompts about company travel policies and/or travel provider discounts regarding various destination services

Coordinated access via mobile app, chat, voice or web to destination service content, functions and assistance based on my travel habits

Seamless coordination of *Destination X* plans/special rates/bookings with colleagues or friends

Instant access to trustworthy reviews and ratings on various destination services

Having one mobile point of access to any relevant destination services

Using my travel loyalty program credentials to directly access discounts with various destination services

Other (please specify)

10   20   30   40 %

[7] GSMA Intelligence, The Mobile Economy 2018 (2018), <https://www.gsma.com/mobileeconomy/wp-content/uploads/2018/02/The-Mobile-Economy-Global-2018.pdf> [date accessed: 06.02.19]

[8] IHS Markit, Evolution from 4G to 5G Service Provider in Survey (2018), <https://technology.ihs.com/605732/5g-trials-in-full-swing-with-12-percent-of-operators-moving-to-commercial-deployment-by-years-end-ihs-markit-survey-says> [date accessed: 06.02.19]

[9] Think with Google, How Mobile Influences Travel Decision Making in Can't-Wait-to-Explore Moments, 2016 <https://www.thinkwithgoogle.com/consumer-insights/mobile-influence-travel-decision-making-explore-moments> [date accessed: 28.01.19]

Better access to the circle of trust

While personalization is expected, it cannot come at the expense of consumer trust.

Nearly a quarter of travelers from our survey say their second-biggest frustration (after not having a single mobile access point for destination services) is finding trustworthy reviews related to the ancillary destination services they are considering. Business and leisure travelers are wary; they want personalized recommendations if they're well presented, so be sure to offer something they can trust. As Alex Rogers, Head of Partnerships at Holiday Taxis explains: "The most important thing for great customer experience is trust, and that you achieve through consistency in the offer. When customers know they can expect a certain level of experience with the brand, they trust it even more."

"We collect feedback from our users through surveys, our customer support center and our ratings. We are trying to get as much feedback as possible from our users to make sure that people are happy. Then based on what we learn, we improve the service."

Guillaume de Lacroix
CMO, The Fork

Ensure there's loyalty in the mix

According to Points.com, 58% of U.S. consumers use smartphones to display loyalty cards and collect points or miles.[10] They also found that these same consumers sought to redeem their loyalty perks and rewards in many other places beside the typical airline/hotel scenario, such as grocery stores, gas stations and restaurants/bars.

Nearly 10% of the travelers we surveyed say they would welcome the use of their loyalty program credentials to access discounts with various ancillary destination services, but this is easier said than done as airline and hotel loyalty schemes are complex. Nonetheless, the potential for collaboration in this area between destination service providers, air/hotel suppliers, travel agencies and corporate travel programs is a ripe opportunity to be explored.

Our view

"What you can attempt to do is to make best of breed educated guesses of what we know would frustrate the traveler and at least try to alleviate that. But in the very near future, we need to appeal more to that 'one minute from now thirst' that travelers have for activities, dining, transportation, parking, as well as other airport services such as lounge passes and security line leaps, etc. But to be deeply intimate and best in breed in each of these categories per region is still a large task."

Michael Bayle
Executive Vice President for Mobile, Amadeus

[10] Points.com, The State of Mobile Wallet Loyalty and Engagement in 2016 (2016), <https://www.points.com/pdfs/points-state-of-mobile-wallet-loyalty2016.pdf> [date accessed: 06.02.19]

Less hunting around, seamless access is a must

Standing in the pouring rain, you're trying (and failing) to hail an Uber in one app, while hunting for a nearby coffee shop in your mobile browser. Meanwhile others like you are just around the corner, inside a hip new coworking space that is hosting an exclusive networking event featuring craft beers from local award-winning brewers. If only you'd known before venturing out in *Destination X*.

A mobile phone connects you with the world, offering a lifeline when you need it and fun when you want it. Unsurprisingly, a recent study by Deakin University revealed 40% of young people today feel 'lost' without their smartphone, while a third would feel anxious if they were unable to regularly check their phone.[11] Travelers in particular, often with little to no convenient access to computers and in an unfamiliar place, rely on mobile phones, especially when it comes to ancillary destination services.

45% of travelers in our survey said they regularly use mobile phones to access destination

services, with a further 11% using mobile-friendly email to do so. Thankfully, some travel companies are making sure these tech-driven travelers don't miss out on any relevant experiential opportunities within *Destination X*.

Valéry Bernard of MyLittleAdventure, an online travel recommendation platform, believes mobile is at the heart of his company's strategy: "We are moving from mobile-first to mobile-only. With mobile usage increasing every year and every month, we cannot ignore its importance in serving the traveler."

Top methods for discovering what to do in *Destination X*

10% via in-app recommendations

11% email

45% search mobile web browser

An exhausting search for information

The mobile phone itself may be a convenient, all-in-one device, but information is often split between multiple apps and websites. To find the experience or activity they want in *Destination X*, travelers must search through each app or site individually – which isn't so convenient after all.

More than a quarter of respondents dislike visiting multiple apps and/or websites to access their desired ancillary destination services. When asked what single biggest improvement they would like to see, over a

third of travelers surveyed rank "having a single mobile point of access to relevant destination information" as number one.

It's what we're used to, and the figures from our research agree. If *Destination X* bound travelers aren't using their mobile web browser to use/discover ancillary destination services (44% do so – the vast majority), then they're looking at emails that are mobile device friendly (11%) or a lucky few are getting proactive notifications from their mobile device (5%).

> "Mobile is key; the use of the smartphone is increasing by the month not just by the year. So being able to provide travelers the information they are looking for is vital."
>
> **Valentina Moise**
> Commercial Director, ParkCloud

Killer mobile app or super mobile web?

Its clear travelers want to access and/or book ancillary destination services with ease from their mobile devices and we believe that, rather than hopping between apps and websites, travelers should spend their limited time comparing and making choices between actual destination services. Destination service providers must work out how best to offer business and leisure travelers a seamless experience. Is it via a purpose-built travel app, or a mobile-friendly website?

Paloma Salmeron Planells, Head of Communications at AirHelp, believes mobile is the way forward. "Having a seamless and perfectly functioning mobile experience is key," she explains. "People expect more and more from service providers and they expect more digitalization so, no matter where they go, they will have information that is accessible through their mobile."

However, Salmeron Planells admits just providing an app may be oversimplifying things. AirHelp helps

delayed air travelers claim compensation and understand their rights as passengers and, while mobile is used initially to solve urgent queries, travelers will often use a desktop device to claim their compensation.

Other businesses have a different approach. Valentina Moise, from airport parking app ParkCloud, says: "When we are developing our website and want to improve the booking experience or to add something to the site, we plan for it 'mobile first'." MyLittleAdventure's Valéry Bernard, adds "Apps are good for bookings, or checking a flight, but when you are looking for something, I would use search because it's quick and I don't have to download anything."

As one traveler we surveyed summarized: "If there is a site/app where we can get our bookings done, receive all the related information in advance, [and] check out doubts during the trip – that is the ideal solution."

11 Deakin University, Neuroticism Blamed for Smartphone Addicition: Deakin Study (2018), <http://www.deakin.edu.au/about-deakin/media-releases/articles/neuroticism-blamed-for-smartphone-addiction-deakin-study> [date accessed: 06.02.19]

Overcoming tech challenges

While the apps versus website battle rages, there are technological issues as well as other stumbling blocks preventing the creation of a seamless, single-place user experience for both business and leisure travelers that still need to be overcome.

Interestingly, 13% of travelers we surveyed feel frustrated by company and/or travel provider policy restrictions, poor tool experiences or simply a lack of destination services data.

Business travelers are just as keen for ancillary destination services to be part of their trip; some 10% of travelers we surveyed say they would like to have consultative prompts about company travel policies or sanctioned, corporate-approved discounts around destination services. Another 5% advocate being able to utilize their credentials from various airline, hotel or other travel loyalty programs to gain additional destination services benefits.

Google consumer insights research shows that travelers really just want solutions that make life easier, with nearly 90% of travelers expecting their travel provider to share relevant information while they are on their trip. And the payoff is well worth it: 67% of travelers say they would feel more loyal to a travel company that shares information to improve their travel experience during their trip.[9]

Alex Rogers, Head of Partnerships at Holiday Taxis, explains how the "Uberization" of consuming has encouraged consumers to want services right now: "Uber brought in the 'one click' book method and you now see this overarching into most mobile apps with a 'buy now' option. This is helping consumers interact with products faster. They want to be able to see it, get the information, and book it without the need for too much information."

Our view

"Millennials and loyalty are two of the toughest things the world is trying to figure out. The ultimate factor for them is really about choice and how choice can be communicated. The minute there are compelling choices, that can be visually presented where you can then select A, B or C, travelers are reassured and can focus on enjoying the actual destination experience."

Michael Bayle
Executive Vice President for Mobile, Amadeus

9 Think with Google, How Mobile Influences Travel Decision Making in Can't-Wait-to-Explore Moments, 2016, < https://www.thinkwithgoogle.com/consumer-insights/mobile-influence-travel-decision-making-explore-moments/> [date accessed: 29.01/19]

Travelers seek more inclusivity

The museum your colleague recommended is nearby, but despite scouring the website you cannot find any information regarding wheelchair accessibility or the safety of the landmark after dark. As your doubts grow, you're less inclined to venture out alone in *Destination X*.

The scenario described above occurs more often than we realize. While the accessible tourism market is worth more than $17.3 billion annually according to the Open Doors Organisation, navigating unfamiliar territory and finding appropriate ancillary destination services on either business or leisure trips still poses a significant challenge to disabled people.[12]

Among adults with disabilities who traveled by air, 72% have encountered major obstacles with airlines and 65% with airports. As a result, in the UK alone an estimated 4 million people with health conditions or impairments simply do not travel at all – because the infrastructure isn't there to support them.[13]

In the 21st century, physical health impairments or reduced mobility shouldn't be a barrier to travel. AARP Travel recently published its 2019 Boomer Travel Trends, assessing the travel behavior of the Baby Boomer generation. A generation with typically higher disposable income, the study found that Boomers take between four and five leisure trips per year on average, spending $6,600 in total.

It turns out that travelers are looking for travel companies to help make travel more inclusive and easier for disabled and aging people. Travelers in our survey told us loud and clear how they feel their overall experience can be improved:

- "It would be helpful to offer more information about disability assistance in airport as well as in destination."

- "Any help you can provide to us regarding attractions and other local sites to people like myself with limited mobility would be good."

- "I'd love to see offers of services for seniors and other people with mobility issues, plus suggested destination activities for us, too, without being overly pushy."

[12] Open Doors Organisation, The 2014 ODO Market Study (2015), <https://opendoorsnfp.org/market-studies/2015-market-study/> [date accessed: 06.02.19]

[13] The Telegraph, Travelling with a disability: Meet the voyager who's rewriting the rulebook, < https://www.telegraph.co.uk/travel/comment/travelling-with-a-disability/> [date accessed: 29.01.19]

Mobility information remains elusive

To ensure inclusivity for all travelers, destination service providers must ensure detailed, up-to-date accessibility information is part of the learning, shopping and booking process.

As well as aids we've discussed previously, such as personalization and targeted notifications, we've identified three specific areas travel providers must consider to improve provision for travelers with health conditions or impairments:

- Content

  Honing in on the exact information senior travelers and travelers with a disability actually need in *Destination X* is an essential starting point.

For example: Can we ensure information regarding stairs, lifts and/or ramps is clear and prominently displayed? Are we providing information that is directly relevant for travelers with visual and hearing impairments?

- Communication

  Good communication isn't just how much information you offer; the delivery of that information is also key. Blind and partially sighted people may need audio and voice services to help them discern which services make the most sense for them, while people with hearing impairments or ASL users may require vibration, touch and visual displays to be alerted to and evaluate specific destination service options.

- Analytics

  There's huge potential for AI, analytics, and algorithms to offer accessibility solutions by linking a traveler's specific needs throughout their whole journey, and identify the types of services they may require in advance.
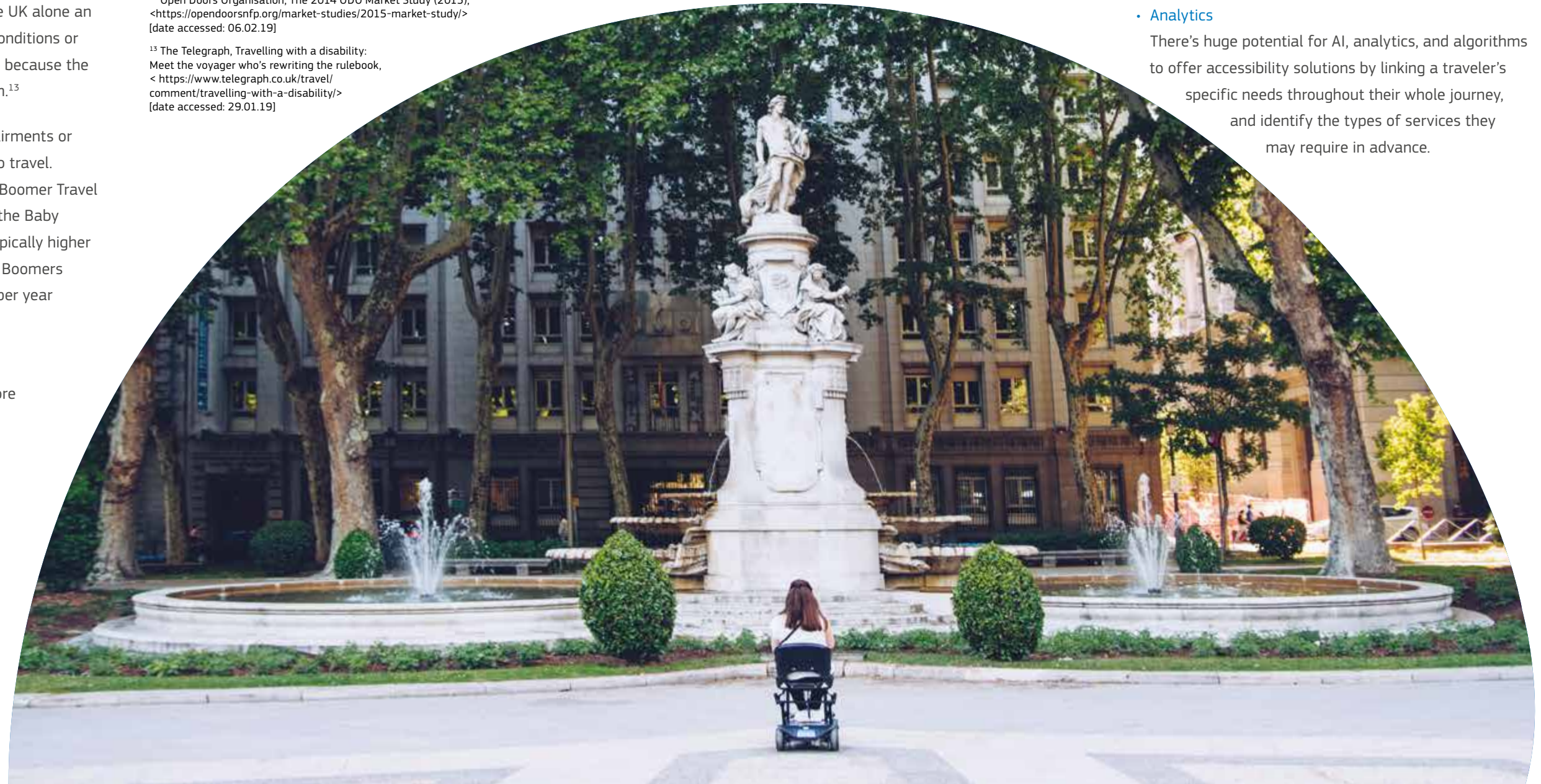
Catering for solo travelers

An increasing number of travelers, particularly Millennials, are conducting business and leisure trips alone; Hostelworld reported a 42% increase in solo traveler bookings between 2016-2018 and Intrepid Travel has seen a 40% growth in solo travel over the past five years.[14]

When questioned on their most pressing fears concerning traveling alone, a survey of 2,000 travelers by ATTA found that 73% of travelers worry about their safety, 53% worry about getting lost and 39% worry about the stress involved in planning a trip.[15]

Our research corroborates this, with many travelers identifying safety as an element of their trips they take extremely seriously, and suggesting advice on how to stay safe in *Destination X* would be highly valuable:

- "It would be great to get advice on how to stay safe while on a trip."

- "The aspect of safety for female travelers is especially important when going to and moving around a destination – this information also needs to be shared."

Whether going solo or as a group we've identified ways destination service providers can enhance how they provide safety information to everyone:

- Content

  Ensure current information about security conditions is properly balanced with older historical data for context, being careful not to frighten travelers or underestimate potential risks.

- Communication

  Optimize push, chat, and voice channels, so in the event of, for example, civil unrest or a natural disaster, the information for travelers is responsive and integrated into the relevant destination service.

- Analytics

  Offering assistance via AI and machine learning is worth considering. Perhaps a traveler is scheduled to go somewhere unfamiliar on business and wants to extend their trip a day or two for leisure – is it safe? There is a real opportunity to introduce ancillary recommendations, advice and guidelines for *Destination X* based on a traveler's safety profile.

Our view

"There are some basic human touches that can often make a big difference. Obviously, these can be automated, but the more human the touch, the better."

Michael Bayle
Executive Vice President for Mobile, Amadeus

[14] HostelWorld, Solo Travel Soars in Popularity: 42% Increase in Bookings Since 2015 (2018), <http://www.hostelworldgroup.com/~/media/Files/H/Hostelworld-v2/press-release/solo-travel-soars-in-popularity.pdf> [date accessed: 06.02.19]

[15] Adventure Travel Trade Association, 20 Adventure Trends to Watch in 2018 (2018), <https://www.adventuretravel.biz/research/20-adventure-trends-to-watch-for-2018/> [date accessed: 06.02.19]

Awaiting travel nirvana

Ping! Your smartwatch vibrates as you leave the airport, notifying you that there are tickets available to see that band you love in concert tonight – and the venue is just a few meters from your hotel. Your digital trip assistant books the tickets and organizes transfers between the airport and the show. Your trip to *Destination X* just went from average to unforgettable.

In the modern world, change is the new constant – especially when it comes to technology. As the internet ushered in the Information Age, travel was an early beneficiary of fast, open, online access to content. The World Wide Web, followed by scores of smartphone apps made finding information faster and more intuitive. Now travelers can use a plethora of messaging, voice recognition and chatbots to discover what's around them.

When it comes to business, leisure, or a bit of both, travelers want access to everything, any time, any place, with minimal effort, and regardless of the channel.

All in one place
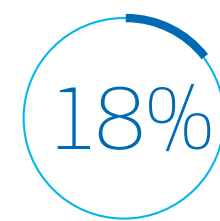
18% want coordinated access via app, chat voice or web to destination services content, functions and assistance based on travel habits.

Nearly 20% of travelers we surveyed say they need coordinated access to ancillary destination service information across mobile app, chat, web or voice assistants based on their unique travel habits.

The future is... vocal

It is estimated that, in the next two years, voice search will make up 50% of all online searches.[16] As voice technology improves and becomes more ubiquitous, it's expected to transform the way travelers interact with and purchase products and services. Our survey respondents say they want seamless technology; voice assistance could be the answer.

Travelers are just beginning to open up to the possibilities of voice search; our survey results reveal less than 5% of travelers say they search for destination services using voice recognition technology such as Alexa, Siri or Google. With access to voice services not yet widely available, limited access may be one reason behind why only a tiny fragment of travelers we heard from have used voice search.

To ask, or not to ask...

According to experts, accelerating the mainstream adoption of voice relies on a few key factors; AirHelp's Paloma Salmeron Planells believes companies are still racing to get voice recognition perfect. "Being able to understand the complexities that come from voice is still so unexplored. It is one of the barriers that most companies or industries face," she explains. "But those companies who understand voice and own it first, will probably have a competitive advantage in the future."

"Voice could work for transfers as a standalone and it could work for destination services and holidays, but you still need the content and visuals," says Valéry Bernard of MyLittleAdventure, suggesting voice search is still in its infancy. CMO of The Fork, Guillaume de Lacroix, is still waiting to see how popular voice technology will be: "We had to ask ourselves internally is it a good time to invest in voice? But what we don't know is how big voice booking will become and when it will happen."

Companies, too, have been cautious to leverage voice search and some of the machine learning happening behind the scenes. Henry Joseph-Grant, CCO of online taxi- and limousine-booking company Talixo, thinks it's a technology worth looking into: "Talixo has been using machine learning and AI for years now for automation, efficiency and yield management. We are looking into different possibilities for voice, as voice has been around for a long time, but we see its application in the ground transportation sector is still in its infancy and not yet fully explored."

There is a considerable effort to start making access and adoption of voice services more widespread. Amazon, Facebook and Google have long intended to make voice search ubiquitous across devices, and hotel chain Marriott and automotive manufacturer BMW are also jumping on this latest tech trend.

The opportunities of voice are a gamble for destination service providers, but hesitating could be a costly mistake. As de Lacroix adds: "We discovered voice could be disruptive, and if it is going to be important in the future, we need to be part of it." And, according to Holiday Taxis Alex Rogers, "Voice could work in the future since we're starting to see the evolution of those devices from purely voice search to having screens, so this will be increasingly important in the future."

Smart speaker ownership in the UK doubled in the first quarter of 2018 and, by Christmas last year, Amazon itself reported that the number of customers purchasing products via Alexa tripled during 2018.[17] As more consumers get exposed to the everyday benefits of voice, we may see a rapid shift in how travelers choose to interact with destination services.

[16] Global Web Index, Voice Search: The Trends to Know <https://www.globalwebindex.com/reports/voice-search-report> [date accessed: 06.02.19]

[17] YouGov, Smart speaker ownership doubles in six months, 2018 <https://yougov.co.uk/topics/politics/articles-reports/2018/04/19/smart-speaker-ownership-doubles-six-months> [date accessed: 29.01.19]

Get smart with AI

While voice technology is poised to transform how travelers discover and access destination services, artificial intelligence (AI) could be the key that unlocks the ultimate potential of *Destination X* for travel sellers. We are already starting to see AI at work in retail in a number of areas: robots are now assisting with inventory checks, monitoring when floors are dirty, helping to manage consumer traffic patterns and keeping track of price tags. More interestingly, retailers are harnessing forecast models based on customer demand to better predict which goods and services their consumers want. A similar approach could be applied to how and when travel sellers curate and present destination services to travelers.

Our view

"Technology developments can no longer be ignored. There is evidence of changes in homes, first with the iPad generation and now starting with voice generation in the last year, but this has to be embraced with automation – and with a recognition of learning which is where AI fits in."

Michael Bayle
Executive Vice President for Mobile, Amadeus

Conclusion: Lighting a better way to *Destination X*

You're in the airport lounge waiting to board. Home is just a two-hour flight away. Catching up on emails, you see your flight compensation claim has been accepted. With work winding down for the week, you can turn your attention to sharing your stunning snaps of amazing sights and eats on Instagram... plus a little contemplating what to do when you return to *Destination X.*

Time-poor, experience-hungry, bleisure-minded travelers want trustworthy, authentic, reliable information that help them turn their travel experiences into moments of productivity and pleasure.

For travelers, mobile is the primary gateway to an array of ancillary destination services. Travel providers must step up to deliver trustworthy information and coordinated access and provide in-destination travel services that are quick, intuitive, seamless, and stress-free.

The outlook is certainly bright – traveler appetite for ancillary destination services is anticipated to keep growing. We know their needs and priorities and we understand the obstacles they face regarding instant access to services. To meet the complex demands and emerging opportunities in *Destination X,* travel agents, corporate travel managers, travel suppliers and travel technologists must all work together on the following:

1. Travelers want instant help: Mobile-savvy travelers need quick-fix, engaging destination content that's accurate, relevant and easy to digest at their fingertips.

2. Super-enhanced experiences only: Travel service providers and destination content aggregators must facilitate enhanced experiences for travelers, presenting personalized offers in a scalable way and tailoring content and services for road warriors as well as and leisure goers.

3. Find what's unique: To stay relevant and appealing to consumers, travel providers must identify and develop their unique propositions, promote their sector expertise and create hyper-personalized, engaging offerings and recommendations.

4. Go 'one-stop-shop': There is huge demand for accessing ancillary destination services through mobile channels. Travel service providers and destination companies need to better integrate their products and services into multi-service apps that leverage chat, messaging, voice and web.

5. Don't forget trust: As numerous service providers have struggled with fake reviews, it is essential destination service providers establish and maintain levels of trust. Reviews and ratings can no longer be an afterthought; they should be considered from day one, providing information without overloading travelers.

6. Harness technology appropriately: With AI predicted to power 95% of customer interactions by 2025, artificial intelligence and machine learning can deliver very personal preferences and services now.[18] Finding the middle way between using AI-based tech (messaging, chatbots and notifications) and interacting with people is key.

7. Keep investing in the future: It's estimated 50% of all search will be accessed by voice in just the next two years.[19] Voice will be increasingly prevalent in the destination services sector, for hotel guest services and also pre-planning and booking stages. As screens are integrated into voice devices, like Amazon Alexa and Google Assistant, we see even more exciting implications for travel discovery and visual stimulation.

The future of travel is all about being open, dynamic and connected. Travelers will continue with or without us, procuring everything they need to make their experience in *Destination X* productive and enjoyable. We have a unique opportunity to exceed their expectations by bringing all the necessary elements together and deliver unparalleled ancillary destination services through a new Live Travel Space. It is here where we will ultimately win the traveler's long-term trust and loyalty.

[18] Servion, What Makes the Emerging Technologies the Future of Customer Experience? (2018), <http://servion.com/blog/what-emerging-technologies-future-customer-experience/> [date accessed: 06.02.19]

[19] Econsultancy, The future of voice search: 2020 and beyond (2018), <https://econsultancy.com/the-future-of-voice-search-2020-and-beyond/> [date accessed: 06.02.19]

References

Adventure Travel Trade Association, 20 Adventure Trends to Watch in 2018 (2018), <https://www.adventuretravel.biz/research/20-adventure-trends-to-watch-for-2018/> [date accessed: 06.02.19]

Airbnb, 'Airbnb and the Rise of Millennial Travel' (2016) <https://2sqy5r1jf93u30kwzc1smfqt-wpengine.netdna-ssl.com/wp-content/uploads/2016/08/MillennialReport.pdf> [accessed 23.01.19]

Deakin University, Neuroticism Blamed for Smartphone Addiction: Deakin Study (2018), <http://www.deakin.edu.au/about-deakin/media-releases/articles/neuroticism-blamed-for-smartphone-addiction-deakin-study>[date accessed: 06.02.19]

Deloitte, 2018 Travel and Hospitality Industry Outlook (2018), <https://www2.deloitte.com/ro/en/pages/consumer-industrial-products/articles/2018-travel-\and-hospitality-industry-outlook.html> [date accessed: 06.02.19]

Econsultancy, The future of voice search: 2020 and beyond (2018), <https://econsultancy.com/the-future-of-voice-search-2020-and-beyond/> [date accessed: 06.02.19]

Global Web Index, Voice Search: The Trends to Know <https://www.globalwebindex.com/reports/voice-search-report> [date accessed: 06.02.19]

GSMA Intelligence, The Mobile Economy 2018 (2018), <https://www.gsma.com/mobileeconomy/wp-content/uploads/2018/02/The-Mobile-Economy-Global-2018.pdf> [date accessed: 06.02.19]

HostelWorld, Solo Travel Soars in Popularity: 42% Increase in Bookings Since 2015 (2018), <http://www.hostelworldgroup.com/~/media/Files/H/Hostelworld-v2/press-release/solo-travel-soars-in-popularity.pdf> [date accessed: 06.02.19]

IHS Markit, Evolution from 4G to 5G Service Provider in Survey (2018), <https://technology.ihs.com/605732/5g-trials-in-full-swing-with-12-percent-of-operators-moving-to-commercial-deployment-by-years-end-ihs-markit-survey-says> [date accessed: 06.02.19]

The Institute of Leadership & Management, 'Summer Holiday Stress', <https://www.institutelm.com/resourceLibrary/summer-holiday-stress.html> [accessed 23.01.19]

Open Doors Organisation, The 2014 ODO Market Study (2015), <https://opendoorsnfp.org/market-studies/2015-market-study/> [date accessed: 06.02.19]

Phocuswright, Travel Activities Market to Reach $183 Billion by 2020 (2017), < https://www.phocuswright.com/Travel-Research/Research-Updates/2017/Travels-Tours-and-Activities-Market-to-Reach-US183B-by-2020> [date accessed: 06.02.19]

Points.com, The State of Mobile Wallet Loyalty and Engagement in 2016 (2016), <https://www.points.com/pdfs/points-state-of-mobile-wallet-loyalty 2016.pdf> [date accessed: 06.02.19]

Servion, What Makes the Emerging Technologies the Future of Customer Experience? (2018), <http://servion.com/blog/what-emerging-technologies-future-customer-experience/> [date accessed: 06.02.19]

The Telegraph, 'Travelling with a disability: Meet the voyager who's rewriting the rulebook' <https://www.telegraph.co.uk/travel/comment/travelling-with-a-disability/> [date accessed: 29.01.19]

Think with Google, 'How Mobile Influences Travel Decision Making in Can't-Wait-to-Explore Moments' (2016) <https://www.thinkwithgoogle.com/consumer-insights/mobile-influence-travel-decision-making-explore-moments> [date accessed: 28.01.19]

WeSwap, From Looking to Booking: How Social Media Is Taking Over Tourism (2018), <https://www.weswap.com/blog/travel/social-media-influencing-holiday/> [date accessed: 06.02.19]

World Youth Student and Educational (WYSE) Travel Confederation, New Horizons IV (2018), <https://www.wysetc.org/research/reports/new-horizons-series/new-horizons-iv/> [date accessed: 06.02.19]

YouGov, Smart speaker ownership doubles in six months, 2018 <https://yougov.co.uk/topics/politics/articlesreports/2018/04/19/smart-speaker-ownership doubles-six-months> [date accessed: 29.01.19]

Our Survey:

Participant Profile

Age: The largest age group in our survey participant pool is 40-59 years old (45%), followed by participants 25-39 years old (37%) and individuals 60 years old and up (14%). Travelers from 18-24 years old age group comprised 4% of our participant pool.

Geography: Survey participants hailed from over 30 countries around the world. Of those who gave their location, the regional breakdown is as follows: Americas (34.2%), Asia Pacific (15.6%), Europe (17.2%) and the Middle East & Africa (16.9%).

Trip Frequency: At least 50% of survey participants took 1-3 trips in the last twelve months. Another 30% of participants reported 4-6 trips taken in the last year. The remaining participant pool stated a very high trip frequency of either 10-12 trips (9%) or 12 or more trips in the last year (8%) and 2% of participants chose not to disclose their trip frequency.

Trip Purpose: Nearly half of survey participants' primary purpose for travel is leisure (46%), followed by 38% who travel for both business and leisure purposes. The remaining 16% of survey participants say their primary purpose for travel is business.

Methodology

1,046 participants were recruited from active users of the CheckMyTrip Android and iOS mobile applications through a targeted in-app message over a period of five weeks, beginning 10th September 2018.

To qualify for the survey, participants were required to be at least 18 years of age.

Images:

Destination X lifestyle photography images courtesy of unsplash.com

---

Thank you to our partners

AirHelp

AirHelp is the world's largest organization specializing in-air passenger rights, helping travelers get compensation for delayed or cancelled flights and instances of denied boarding. AirHelp has helped more than 10 million people, is available in 30 countries and employs more than 550 employees.

ParkCloud

European airport parking leader, ParkCloud, is dedicated to connecting the world's drivers with parking spaces. Working with travel industry market leaders, ParkCloud ensures parking is not a forgotten aspect of the travel process. ParkCloud consists of a portfolio of 22 airline partners and collaborating with more than 2,000 car parks across 42 countries.

thefork
a TripAdvisor company

TheFork offers more than 30,000 restaurants available at any time, at the best price, in France, Spain, Switzerland, Belgium, Italy, Sweden, and more! With over 5 million reliable reviews to guide you, you will definitely find the perfect restaurant.

MyLittleAdventure

MyLittleAdventure is the most advanced in-destination platform. We empower travellers to create their best travel memories thanks to our smart recommendation engine which easily finds the best things to do in every destination: best prices, best options and best ideas.

HolidayTaxis Group
making travel easier

HolidayTaxis Group is the leading B2B provider of global ground transportation. Fulfilling transfer options ranging from public transport and shared shuttle options to private and executive transfers in more than 150 countries worldwide. Connected to partners via white label, API and offline solutions, providing a one-stop-shop solution.

TALIXO

Talixo is revolutionising corporate and B2B ground transfers for the world's largest companies, airlines, travel agencies and online travel platforms. With world-class technology and efficiency we provide reliable, licensed, standardised services for all budgets, policies and use cases in 100+ countries and 1000+ locations.

Join us in the
LIVE TRAVEL SPACE
Open | Dynamic | Connected

Amadeus Mobile COLLECTIVE

AMADEUS