

Traveller Trends Observatory

Understanding the end
consumer (and traveller)
Corporate Citizens



Overview

The Amadeus Traveller Trend Observatory zooming into the Corporate Citizen World

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The Traveller Trend Observatory (ATTO)

Understanding why?



Why the traveller?

Understanding the travel industry from start to finish

In any industry, understanding how the work of an organisation affects every other aspect is imperative for success. In travel, one of these key components is the traveller. Whilst Amadeus does not directly work with the end consumer, to better serve their customers, travel providers, Amadeus has a requirement to know exactly what the consumer wants.



By understanding the consumers' needs, Amadeus can:

Provide all components in the travel chain:

- Better products
- More effective services
- More insightful consultation

Create even more value by supporting

- Cutting-edge innovation
- More in-depth research & development
- Forward thinking ideas

Through taking the time to research and understand travellers, Amadeus aims to support and improve the overall travel eco-system and to help shape the future of travel.

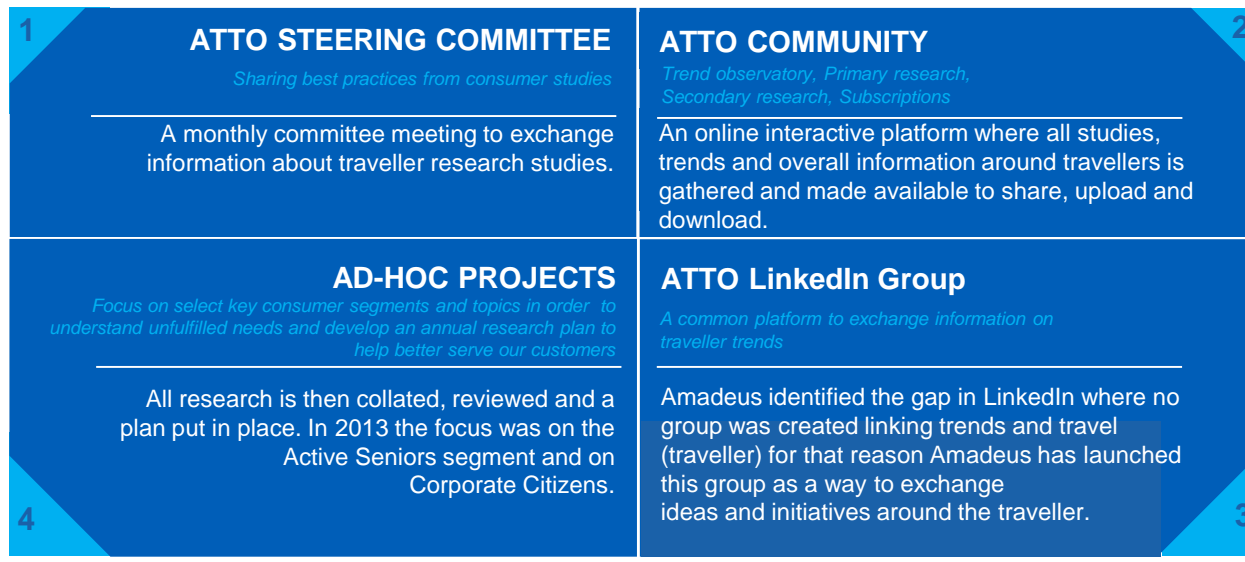
What is ATTO?

A simple overview of the ATTO initiative

- **The ATTO initiative originated with a clear goal: deploy a systematic research methodology to better understand the evolution of the traveller's behaviours and needs.**

A discussion forum (ATTO Steering Committee) and an interactive online platform (ATTO Internal Community) are available in Amadeus as ways to ensure that ATTO is the single entry point for research activities related to the end consumer and the traveller. In parallel to this ATTO focuses on strategic segments and topics each year – which are referred to as Ad-hoc projects.

Below is the ATTO thought process, which ensures a continuous cycle of innovation.



2013 Executive Summary

Our key learnings



Introduction to the Corporate Citizen world

2013 Focus: the Corporate Citizen traveller

Today's corporate citizens find themselves in a world where technology is blurring the lines between their personal and professional lives. This means that they are always 'connected', regardless of where they are located or working from. This has major implications on their ability to achieve a work-life balance, something they value highly in today's day and age. This is a transformation that the youngest professionals are embracing more easily.

— Corporate Citizen background

Corporations are striving to drive efficiencies in travel budgets.

Corporate Citizens see travel overall as an attractive part of the work as it allows them to have enriching experiences and get away from the routine. However there is a trade off between the planning, support on transit and expense management, where travellers in general would appreciate more solid and consolidated support.

Being consumers themselves, Corporate Citizens share similar trends with the general population and they expect to have also similar experience at the time of shopping. In terms of Social Media, their usage and attitudes towards it changes depending on age and countries. In Europe, there is a growing concern about security and less interest on actively contributing to this, but rather a passive usage of this channel.

Based on this how do they perceive the value of travel both personally and professionally? How can travel players help make trips more interesting? What can be done to satisfy the budget-conscious corporations?

This report showcases the main needs for the Corporate Citizen traveller both now and in the future.



Executive Summary

An overview of the 2013 ATTO Ad Hoc Project: Corporate Citizens

Corporate Citizens are frequent travellers with mid to top positions in their companies. Travel represents an activity that goes beyond the pure travelling experience, but rather starts at the time of planning and finishes once they are back and expenses need to be reported.

As such, they expect to receive services that cater and serve appropriately all stages of travel from planning, booking, transit and post trip. Ideally this would mean the best of 2 worlds: the easy navigation experience that they live as leisure travellers and the efficiency in terms of time and comfort that should represent the business travel.

On the other hand, corporations are experiencing increased pressure to reduce costs: a good illustration of this is the reduction of the frequency of trips and the increase in the length of stay to optimise the costs of each trip. The increased focus on cost efficiencies also translates to travel planning: travel plans are requested well in advanced in order to secure better deals, better costs in case of organising events – looking for off season travel dates for example – or lower fares when fixing visits to customers. All these considerations represent an opportunity for Travel Management Companies to improve their value proposition to their customers.

Consequently, there is a clear need for managed travel to prove their added value in areas such as travel planning, shopping and booking, providing unique deals and seamless customer service. Managed travel should be relevant and present in all stages of travel.

”

I enjoy travel, the change of scenario, meeting my co-workers and clients, meeting them face to face

Participant, US



A Corporate Citizen traveller is defined as someone who has travelled on business at least 3 times in the past year, with an overnight stay. For a full definition of what a "Corporate Citizen" is please see page 11

Executive Summary

Personalisation, Efficiency & Caring

In-depth qualitative research has enabled Amadeus to develop insightful conclusions about Corporate Citizen travellers' needs and expectations. The following three key themes were defined to understand these evolving needs:

”

Business travel today is very hectic, you have to try for the best, and be prepared for the worst.

Participant, IN

Personalisation

Corporate Citizens are big fans of people who listen. They value when their preferences, requirements, likes and dislikes are remembered when they travel so that they can efficiently manage their travel options. A degree of flexibility for them to tailor their experiences is key.

Efficiency

From both a time and cost perspective. They are empowered by technology and social media to make quick, cost conscious decisions that can help them and their organisations drive cost efficiencies. They look for a one stop shop, where search, booking and management can all be handled.

Caring

Travel could be considered amongst one of the company benefits, as many business travellers are expressing their interest in combining if possible, business and leisure travel.

Additionally, companies should focus on reducing pain points or elements that generate anxiety, stress or frustration at the time of travel.

2013 Research Plan

Corporate Citizens



The Corporate Citizen traveller Criteria

What defines a Corporate Citizen traveller?



> 3 trips per year
with one night stay,
with flight/high
speed rail



Mid-level to top
executive



Working at a mid-
large sized
corporation



Combination of
companies with
managed and
unmanaged travel



The conclusions drawn seem to vary on both geographical location and age. For example in Russia or Brazil the experience of work compensation packages is very low (therefore considered a utopia), whereas in countries such as Sweden and the United States these policies are highly evolved.

”

A remarkable shopping experience is when you achieve something extra (save time, better offer, lower price, better service), no matter whether you are doing it offline or online

Participant, SE

Research overview

How the research was conducted from start to finish

2013

Q1	Q2	Q3	Q4
1. Trend analysis & desk research			
	2. Pre-task activities and in-depth interviews		
			3. Amadeus presentation and brainstorming sessions

1 Trend analysis & Desk research	2 Pre-task activities In-depth interviews	3 Presentation	4 Amadeus insight workshop
<p>Analysing consumer trends in the area of retail and technology and their implications to the world of travel.</p> <p>ATTO Steering Committee feedback.</p>	<p>30 people from 6 countries.</p> <p><i>Scandinavia, France, Russia, USA, Brazil & India</i></p> <p>Recruiting people from different countries ensured a broad representation was researched.</p> <p>ATTO Steering Committee feedback.</p>	<p>Country specific information and global trends were analysed in order to define key insights around the topic and their corresponding dissemination of results.</p> <p>ATTO Steering Committee feedback.</p>	<p>Amadeus participants from different departments were exposed to the key findings from the Corporate Citizens ATTO Research Plan (trends, desk research & in-depth interviews) to define an action plan.</p> <p>ATTO Steering Committee feedback.</p>

The results: 3 key trends

Corporate Citizens



Personalisation

One single shared identity

Corporate Citizens want their personal preferences to be universally understood and applied. This includes an appreciation for where their professional life may impact their personal space.

— Universal profile

Corporate Citizens now have an expectation that support services should take information about their preferences from the various multiple sources and combine them to build a complete picture of their needs. This includes using information from past trips and preferences as a reference point.

This is critical when it comes to booking and ancillary preferences.

Research shows that travellers are willing to provide personal information as long as this ensures a more personalised service in return.

— Hybrid world

Corporate Citizens feel that through travel they have the opportunity to satisfy both their professional and personal ambitions. They become explorers in their free time and want to squeeze in experiences as and where they can. This also means that disruptions have to be minimised, to maximise the opportunity to do new things.

— Sound familiar?

Whilst the adoption of social media is inconsistent from Corporate Citizens, the emphasis placed on User Generated Content (UGC) and more importantly Corporate Generated Content (CGC) is growing. This holds great value when it comes to validating travel options.



”

Providers should pay attention to customer preferences and even go a step further. While I travel, I used to look things up in my smartphone; maps, what is around the hotel, restaurants, places to shop or I just ask at the hotel, depends on how much time I have.

Participant, US

Personalisation

What does this mean for travel?



— On the go

As the expectation for Corporate Citizens to work from anywhere at anytime increases, their reliance on information being available at the right time and in the right place is key. This applies more to information being available on their smartphones, whilst they're on the go. But also includes 24/7 support and assistance as where they need it.

— Work friends

With the blurring of lines between personal and professional lives, Corporate Citizens are also changing their perceptions of how they see their personal contacts. Some of them now see value in merging their profiles on social media as the potential blend can open up more opportunities.

— Unique Experiences

Customers in general are looking to maximise the number of relevant experiences (as having meaningful experiences are increasing in value vs. owning things per se). Travel represents a perfect opportunity to meet this demand even in the case of business travel. Filtered access (by traveller profile) to the right local activities or things to do at destination in relation to the location and time available, would be a plus, specially in the case of unknown destinations.

”

Besides the traveller profile, I think it would be valuable to have options for different travel purposes which can imply different travel requirements at destination

Participant, SE

Efficiency

The cost of achieving a balance

The increasing pressure on costs implies that the planning part of the travel is increasingly important: comfort is still key, but this is also closely monitored. In parallel, services that make the whole travel experience easier and smoother are essential to improving the adoption rates of companies with managed travel.

— Less is more

Corporate Citizens are being urged to reduce the amount of times they travel and extract more from their trips, usually by extending the length to make the most of them. This is formalised through more stringent corporate travel policies.

— Be prepared

Corporate Citizens are big fans of eliminating uncertainty and ensuring that they are clear on where and when they are going. This now extends to information about destination services, especially from the emerging markets where travellers are unfamiliar with where they are going. They are attracted by integrated systems that can manage everything from door-to-door.

— Smart consumers

Taking experience from their personal lives, Corporate Citizens feel empowered to find better deals themselves. They feel that they have access to as much information as anyone else and therefore can be in control of their travel decisions.



”

It would be great to have a website where you can book everything you want, read reviews and get a discount for frequent usage. Price is not everything, it must be a travel convenient as well not too much waiting time, preferably a direct flight. If you get a bonus is fine, but can't always decide when you travel

Participant, SE

Efficiency

What does this mean for travel?

— **More than money**

Even though efficiency is based on driving down costs, the balance that Corporate Citizens strive for also assess comfort and time. They believe that through efficient procurement, i.e. planning ahead and buying in bulk they can benefit from efficiencies that allow them to strike a balance.

— **One stop shop**

Corporate Citizens would like to have a one stop shop for all areas related to travel, from planning to post trip. And linked to this a single combined ticket that would integrate all their booking arrangements including local transfers and ancillary services.

— **Inefficiency is an expense**

One of the key pain points highlighted by Corporate Citizens was the difficulty and inefficiency that is caused by manual expense management. They are highly frustrated and look for efficiency and seamless ways to record and manage this information.

”

From the company's perspective, integrated travel would streamline processes of approving, reporting, and reimbursing expenses and could reduce costs by saving time, eliminating duplication of services, and negotiating better rates for services whenever possible

Participant, US

Caring

The bigger picture

Corporate Citizens have reformed their relationship with their employer, they don't see being at home or at work as separate places. This blur now places greater emphasis on how the relationship is structured and what the expectations of the Corporate Citizen are.

— Building together

Whilst the concept of compensation packages may be relatively new in some of the emerging BRIC economies, the trend to make them more cumbersome is one that is prevalent with Corporate Citizens. They look for a package that reflects their personal circumstances, whether that be age or marital status. In this instance some Corporate Citizens may consider travel to be a corporate benefit.

— Not another chore

Whilst Corporate Citizens are always connected to work, they are also always connected to home. This is something that plays a major role when travelling, especially for longer trips. Organisations that are able to understand these requirements, whether it be through child support, cleaning or even merging family vacations together will be more successful in working with Corporate Citizens.

— Peace of mind

Security and reducing pain points for the traveller should be an essential component of the companies' travel policy.



”

The least thing I like about travel are delays, waiting, mess up with schedules. When this happens I use email and telephone.

Participant, US

Caring

What does this mean for travel?

— Good to talk

With many of the Corporate Citizens falling in the midlife parent category, they often find it difficult to travel as they miss their young children. Supporting them with mechanisms to keep in touch with their loved ones is a key motivator for them whilst they travel.

— Mind the gap

Corporate Citizens are obsessed with minimising travel time, whilst they try to make the most of every minute they are on the move. Therefore when in transit or facing travel disruption, they require quick, efficient and seamless support to get them moving once again.

— Going the extra mile

Where travel is seen as a benefit to Corporate Citizens, taking it that level further and allowing them to extend work based travel is seen as an even bigger plus. Especially when they can benefit from the company's negotiated corporate rates and discounts.



”

I have combined business and leisure in the past, it is a great idea and even the plane fare is cheaper. If I'm going to spend week after week I can spend the weekend.

Participant, US

The series continues

With new questions for
travellers



The next stage of the ATTO project

Looking into strategic customer segments and topics

The journey to understanding the traveller continues this year, as we develop our insights by monitoring emerging consumer trends.

This year we will see new challenges that the industry will have to face and overcome. And, as an industry leader, we at Amadeus want to ensure that we remain at the forefront of new developments through innovation.

We will continue to learn and pre-empt information about all customer segments, driving forward research and new ideas for the foreseeable future. You can stay connected with each of our developments through our [web](#) or the Amadeus Blog.

Look out for our other reports on the NextGen traveller and Active Seniors.



Thank you

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