Foreword from Expedia and Egencia

In the 1990s, Expedia turned the travel industry on its head by unlocking travel agent information and bringing it to the mass market. The question, as Expedia approaches its 18th birthday and Expedia Inc.’s business travel company, Egencia, turns 11, how do we meet the needs of these future travellers? How will the generations who grew up in this new travel world plan and book leisure and business travel, and more importantly – how will the two converge?

In a world of rapid technological innovation, businesses such as ours must anticipate and innovate with great velocity: staying one step ahead of our customers to cater not just for their needs today, but for tomorrow and the trips they will book in the future. Collaboration is critical, as our businesses connect travellers with our partners.

Communication across the industry and with our partners is key to understanding the future of travel, both the challenges and opportunities. We know it’s important to take a holistic view of the behavioral patterns of our current customers, and those who may turn to us in the future. That’s why we have commissioned Harris Interactive to examine the needs and preferences of our global travel audience to understand how Millennial generations differ from the previous ones.

We see the traveller of tomorrow operating in an ever-more fluid space, a world of blurred boundaries. They expect to move seamlessly from device-to-device; from online to offline and back again; from business to leisure and vice versa.
We see the traveller of tomorrow operating in an ever-more fluid space, a world of blurred boundaries. They expect to move seamlessly from device to device; from online to offline and back again; from business to leisure and vice versa. Mobile is their personal assistant helping them to plan and book travel; change plans, especially in business travel; connect with friends and colleagues. Their office may be on the plane, at the airport or in a hotel room, and Wi-Fi is more important than extra legroom or upgrades.

We realize that keeping pace with Millennial generations demands significant focus on mobile in order to sustainably engage them with the right information. Their priority is to cut through the clutter, preferring brands and services which save them time, and ones that make life and "life on the road" easier and more enjoyable.

Millennial generations have high expectations, but contribute heavily, creating content and sharing their experiences. The responsibility for business is to facilitate feedback in a structured format, and combine and interpret in conjunction with other data – making Big Data smart data. Our commercial imperative is to work with customers to make sense of this data and to return their trust in sharing feedback and personal information with real value.

In a world where you can virtually walk down city streets from the comfort of your armchair or see the Seven Wonders of the World cascading across your screen, many travellers are shifting priorities from seeing to “experiencing.” For a large proportion of the Millennial generation, leisure travel is about authenticity, getting under the skin of a destination, learning a new skill. For these travellers, traditional ‘origin’ – ‘destination’ – ‘date’ search forms are redundant. These travellers demand that we answer broader questions, harder to define by traditional search parameters: “I want to learn about a new type of cuisine?” or “I want to try a new outdoor activity,” or even just “I want a real adrenalin rush.”

At the same time, we need to offer the flexibility to cater for those with a specific destination, budget or date frame in mind. For these business and leisure travellers how can we offer deeper insight to assist with questions like “How do I easily get from point A to point B?”, “How do I find things to do that match my interests – food, recreation, local history?” And “how do I navigate changes to my itinerary during my trip?”

We realize that keeping pace with Millennial generations demands significant focus on mobile in order to sustainably engage them with the right information. Their priority is to cut through the clutter, preferring brands and services, which save them time, and ones that make life and "life on the road" easier and more enjoyable.
We see a new wave of travellers emerging from the markets like the BRIC countries – many of whom are seeing the iconic tourist sites for the first time. We must work together with our tourism partners to ensure that in our efforts to support the authenticity and experience seekers, we don’t undervalue the allure that seeing the places in the flesh still holds. This is equally true for business, where travel is a core accelerator in driving emerging economic growth. How can we work with our partners to ensure that business travellers are effectively supported in becoming part of the new economy?

In the 90s, we empowered our partners and our leisure audience to create their own travel packages, and over the last 10-plus-years we have given business travellers better choice and access to familiar and user-centric travel solutions.

We remain committed to providing added value for our partners in the future by helping them to flex and adapt the way they market their services so they are just as relevant to a traveller from Mumbai as they are to those from Manchester to Miami.

As we plan for the future of travel, our role is to delight all our customers as they plan their next vacation or business trip. Let’s engage them with the “best ever” travel experience – which is personal and collaborative, fluid and flexible, and of course… mobile!
The Future of Travel

Written and researched by Peter Myers, in collaboration with Expedia and Egencia

Introduction

Welcome to Expedia and Egencia’s first foray into the travel industry’s future. Egencia from the corporate and business travel side of the Expedia Inc. brand portfolio and the Expedia brand on the leisure side have come together to examine how these two pillars of travel are set to evolve in the coming years. Focusing on the ways travellers intertwine their business and leisure travel habits, this study comes out as the travel industry is on the cusp of potentially transformative technological revolution in regards to big data, personalisation and devices.

On a wider, macroeconomic level, the industry is experiencing an inexorable market shift from West to East as the latter’s middle class expands on an exponential scale. Tourism and Business Travel executives therefore must negotiate a great variation from market to market as per what inspires travellers, what makes them transact and on what interfaces.

For tourist boards, new travellers mean new sources of business and leisure travel income, but also new challenges – from access and infrastructure through to language and culture. Beyond that, they must look to service both established travellers who have ‘seen the sights’ and are looking for more, alongside those newly discovering the world beyond their borders.

While the US remains one of the largest travel markets – valued at $318 billion, the BRIC markets are important growth markets to watch.

- The Russian travel market accounted for $48.6 billion in 2011 (60 percent of the total Eastern European market) and PhoCusWright estimates that this will grow to over $58 billion in 2013.
- PhoCusWright reports that Indian travel gross bookings totalled $19.6 billion in 2012 and will rise 18 percent to $23.2 billion in 2013.
- There are approximately 256 million travellers in China, more than double the number of travellers in the U.S.
• In 2012, China overtook Japan to become the single largest travel market in Asia Pacific, with gross bookings exceeding $96 billion.

• The Latin American travel market is estimated at around $68 billion in 2012 dominated by Brazil and Mexico.

In this report we have set out to look forward in two ways. Firstly by comparing the attitudes of travellers young and old, over a range of both emerging and developed markets, on mobile, social, loyalty, personalisation, technology and policies, across both business travel and leisure travel.

Such analysis allows us to chart a course on how travel is likely to change in the years to come as the younger set gain influence in their work and personal lives and as new markets make their presence felt.

Secondly, this data is interlaced with extensive analysis and commentary from distinguished marketers, online retail analysts and tourism executives from across the industry. All were asked to assess the challenges and opportunities for the future of our industry.

Methodology

This Expedia and Egencia survey was conducted online from August 20, 2013 to September 12, 2013 across Europe, North America, South America and Asia Pacific by Harris Interactive among 8,535 respondents over the age of 18. In order to qualify to take the full survey, respondents had to be employed full time, part time or self-employed. In this report we consider Millennials to be those born between the early 80s and the mid 90s.

The survey examined business and leisure travel attitudes and behaviours among the residents of Europe (United Kingdom, Denmark, France, Austria, Germany, Ireland, Italy, Spain, Sweden, the Netherlands and Norway), Asia Pacific (India, Japan, Malaysia, Hong Kong, Thailand, Singapore, South Korea, Australia, and New Zealand), North America (United States, Canada, and Mexico), and Brazil.

Findings

It’s personal: Welcome to the traveller of the future

Whether hailing from developed or emerging markets, Millennials – those currently under 30 years of age – grew up in the world of mobile devices, the internet and social media.
Because the self-service age of digital systems seems innate to this age group, not only do they have higher trust in the internet but also higher expectations about how sites and apps will deliver great personal experiences using that information and the speed at which that should happen. The Millennial generation expect to be in control and make their own decisions.

For Millennials, service doesn’t mean having someone else help you as much as having something help you. For this generation, technology, particularly mobile is their personal assistant, enabling them to stay in touch, ensuring they remember their meetings or friends’ birthdays, telling them when to be where and how to get there.

Expedia and Egencia research shows that Millennials are planning and booking travel using their smartphones more than any other group. They are also using these devices to aid and inform their journeys when on the road.

**Use of Smartphones throughout the Journey in percent**

<table>
<thead>
<tr>
<th>Use of Smartphone</th>
<th>18-30</th>
<th>31-45</th>
<th>46-65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning a trip</td>
<td>49%</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Sharing my trip when travelling</td>
<td>34%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>Sharing news about my trip after I’m back</td>
<td>26%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Booking a trip</td>
<td>26%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Editing my trip when travelling</td>
<td>24%</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>I haven’t used my smartphone for travel</td>
<td>29%</td>
<td>21%</td>
<td>18%</td>
</tr>
</tbody>
</table>

**Question:** What part of the travel process have you used your Smartphone for (check all that apply)? (Base: Use Smartphone)
Considerably more Millennials book leisure travel on personal devices than any other age group. Our data put this at 41 percent vs. 14 percent of over-45s. The younger group are also more likely to use their smartphones and tablets for booking business travel (52 percent of under-30s against just 21 percent of over-45s).

Use of Smartphones for Booking Business and Leisure Travel (%)

Q: In the last year, through which of the following have you booked personal travel? Please choose all that apply. (Base: All Qualified Respondents)

Q: In the last year, through which of the following devices has your business? Please choose all that apply. (Base: 1 or More Business Trips) Results for smartphone bookings.

Once on the road, Millennials are making their demands felt; they’re twice as likely to care about on-board Wi-Fi when booking business travel – globally 14 percent of the younger workers report this as important vs. 6 percent of workers aged 46-65.

If there was just one statistic in the report that paints a picture of travel’s self-service future it is this: Only 18 percent of those under 30 haven’t used a smartphone for travel. This compares to 45 percent of the 46-65 year-olds surveyed.

It is settled: Travel providers have to be fully enabled through any platform, knowing that buyers interface, interact and navigate through different devices in very different ways.

For independent or smaller travel businesses this represents a significant technological challenge and investment – intermediaries such as OTAs will increasingly help in this area.
Millennials in profile

Millennials are travelling more. Globally, those 30 and under are travelling more for business than those aged 30-45 or 46-65. The under-30s travel 4.7 times per year compared with 3.6 and 4.2 times respectively for the older two age groups.

In the leisure sphere, Millennials travel on average 4.2 times a year compared to 2.9 and 3.2 times per year respectively for the older segments.

And increasingly, the lines between business and leisure are blurring for this age group: Millennials have grown up in a world of working from remote locations and on the move so when it comes to business travel they are equally comfortable with blurred boundaries.

Just over half (54 percent) of employees have extended a business trip into a holiday. Millennials are more likely to extend their work trips to turn them into personal trips – and are twice as likely to do so when travelling alone than their counterparts over 45.

**Adding Leisure Trips to Business Travel (in %)**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes, and I've had a family member or friend join me</th>
<th>Yes, but I've travelled alone for the business part</th>
<th>No, I haven't extended a business trip into a leisure trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-30</td>
<td>38%</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>31-45</td>
<td>49%</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>46-65</td>
<td>63%</td>
<td>18%</td>
<td>20%</td>
</tr>
</tbody>
</table>

**Q:** In the past year, have you extended a business trip into a personal holiday, vacation or getaway? (Base: 1 or More Business Trips)
Eighty-six percent of Millennials have no qualms about using reward points earned from business travel for leisure compared to just 72 percent of those 46-65.

Just as technology has helped many Millennials achieve a better work-life balance, they also collaborate to enhance the experience for others. They are a sharing generation.

Forty percent of Millennials share a trip on social networks while travelling compared to 34 percent of those aged 31-45 and 23 percent of 46-65 year-olds. And 34 percent of them share details of the trip upon their return, vs. 26 percent and 19 percent of the respective older segments.

Millennials also contribute heavily to generating both positive and negative reviews across all segments of their journey.

**Positively Reviewing Travel Services (in %)**

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<table>
<thead>
<tr>
<th></th>
<th>18-30</th>
<th>31-45</th>
<th>46-65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>40</td>
<td>30</td>
<td>20</td>
</tr>
<tr>
<td>Restaurants</td>
<td>30</td>
<td>25</td>
<td>15</td>
</tr>
<tr>
<td>Flights</td>
<td>20</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Public transportation</td>
<td>10</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Rental cars</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Taxis</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I haven't posted a positive review</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
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**A changing culture: new markets, new habits**

Analysing the data from a regional perspective, note that while only 65% of Europeans use their smartphone or tablet for business travel purposes, in Asia-Pacific 82% use these devices. In a similar vein, Mexicans are more likely to say they use these devices (82%) compared to Americans (73%) and Canadians (64%). Use of personal mobile devices for business travel purposes is particularly high among Brazilians (84%).

Q: In the past year, for which of the following have you written/posted praise, posted a positive travel review or a positive social media post about a travel-related experience? (Base: All Qualified Respondents)

Q: If you posted, for which type of the following travel? (Base: Posted Positive Review)
Q: In the past year, for which of the following have you written/posted praise, posted a negative travel review or a negative social media post about a travel-related experience? (Base: All Qualified Respondents)

Q: If you posted, for which type of the following travel? (Base: Posted Negative Review)
Our Vision: The Future of Travel

Looking ahead into the middle distance, we envisage a future where evolved travel-provider environments across all platforms better inspire the self-service traveller with tempting offers.

Brands will develop new ways to engage with their customers, built on collaboration and flexibility – with search options that surpass origin and destination to include the traveller’s budget, their interests and travel motives.

Successful brands will also ‘learn’ from collective customer behaviour to deliver intelligent suggestions and recommendations, while facilitating integration with the social graph at pertinent points in the journey to enhance that experience. Mobile and geo-location will aid brands in delivery of the right information, at the right time, taking into account the traveller’s personal situation.

In a world where new experiences become more important than ticking landmark destinations off a list, flexible criteria will allow a customer to pose open questions and search for concepts not just places. Rather than the rigid constraints of an origin+destination+date search, this could be along the lines of: ‘I want a wonderful new experience this year, tell me what my best options are’; or, ‘I just want to go to the best beach possible for X amount of money’.

Tim Pritchard of TNS says: “When I’m travelling with my family, I might not mind where I sit: I’ve got a load of screaming kids and I’m more worried about bothering other people. But when I’m travelling for business I have very different preferences.”

Liaising with customers and enabling co-curation, travel providers will be able to offer more intelligent recommendations based on customers’ ‘modes’ at a particular point in time – do they want to book business travel, family travel, a yoga and meditation retreat, a snowboarding break?

Always transparent, travel services can avoid approaching the ‘creepy line’ by seeking permission to use customer data in ways that will add obvious value to them. If, for example, a corporate customer knows that by sharing her travel data, her car-rental company and hotel will find out and react accordingly when her plane is delayed, she will more likely want in.

Millennials say they are twice as likely to care about onboard Wi-Fi when booking business travel – globally 14 percent of the younger workers report this as important versus 6 percent of workers 46-65. Fifteen percent of Millennials cited this as an incentive to share data compared to just 8 percent of those 31-45 and only 5 percent of those 46-56 years old.
Considering today’s trends and technology, we see a world where during the trip, admin is slickly automated. A virtual personal assistant stores the traveller’s tickets and handles their real-time-updatable itinerary, along with all boarding passes and hotel check-in information. Any delays are automatically relayed to the relevant hotels, car-rental firms or cruise operators. Suggestions are provided to fill wait times – perhaps a recommended restaurant to while away some time before hitting the airport. As airports turn to trading hubs, your mobile could alert you to any contacts in the area you may want to meet.

On the plane, travellers will tap into on-board Wi-Fi to plan and book their next steps and plan experiences for when they arrive. At the airport, passengers glide, with their e-passports and smart visas, through terminals uninterrupted by checkpoints and not held up by queues; the journey monitored by sensors that ‘talk’ to their requisite personal device. At certain touch-points, like immigration and security, they might encounter automated kiosks for biometric identification that use face, fingerprint, iris or voice ID.

Airlines and airports intelligently share relevant data. So, for example, airports could better predict the number or staff they’d need at checkpoints at any one time; perhaps airports could even offer a special welcome service for stressed parents with tired kids or for the weary business traveller?

The self-service traveller is an independent traveller. As package tours morph into experiential voyages for leisure customers, business travellers, with a world of information at their fingertips, meld work with pleasure and overlay trips with cheeky leisure itineraries.

Our vision, in summary, is for the world of online travel to take the best of what bricks and mortar agencies offer in terms of personalisation and the human touch, so we can create trips that from start to finish allow the mobile-device-clutching voyager to enjoy a seamless and connected journey.

A limit to personalisation?

Personalisation can only go so far; some offers should remain neutral. It is clear that balance is needed between a world where there’s only personalised offers and one which presents a neutral set of offers.

Once faced with a well curated range of personalised and general offers, the traveller can in the words of Sabre’s Chris Kroeger say, “Here's what's generally available; I can do my broad comparison shopping; I can see what's there and now I want to see if that supplier wants to do something personalised for me.”
So why aren’t we there yet?

The proliferation of new technology brings with it the paradox of choice and care must be made to reign in content and stop browsers feeling like they are faced with an information overload. A recent PhoCusWright study for Amadeus found that it is the “organisation and navigability of content that typically frustrates people, along with a healthy dose of irrelevant information.”

To give some context to the scale of the complexity of finding the most relevant information, imagine a roundtrip flight from Los Angeles (LAX) to New York (JFK).

How many roundtrip non-stop, one-stop and two-stop routes exist between LAX and JFK, for any arrival & departure day?

At the time of writing of this report, seven major carriers provide a non-stop service from LAX to JFK; eight different departure times exist for each carrier on a given day. So there are 56 unique options to fly out in one direction and over 3,000 possibilities of non-stop round-trip routes. Add one stop and the options are in the billions; for two stops it becomes trillions.

This is the challenge for suppliers, but equally for travellers. Chris Kroeger, SVP Marketing Sabre Travel Network notes travellers are currently faced with “a lot more information to sift through to actually compare apples to apples.” He adds that the challenge for travel technology is to “take all of that information... and make it easier to do that apples to apples comparison shopping so that buyers can see a complete picture, they can do it efficiently, they have the information they need, they can make informed decisions.”
Battling Big Data and the challenges of personalisation

Big Data is not smart data. Somewhere in the morass of amalgamated personal information lies the key to how we can inspire clients with the perfect set of personalised offers. Tim Pritchard of TNS notes that, “technically you need big powerful servers to actually process big data – you need the right information scientists/marketers, brand experts and that’s the issue (running the machinery). I think the technology is there, I don’t think there are enough big data experts out there.”

**Historical data and future intention**

While at the Amazon-style businesses of the world returning customers are greeted with ‘you might also like’ offers, Ryan Garner, digital technology director at GFK, suggests these analytics will continue to get more intelligent.

“I think Big Data and predictive analytics will really help in separating out [a customer’s different profiles] and hopefully in the future you will see that the recommendations aren’t irrelevant when looking to book something based on their previous history.”

“It’s not always what you booked in the past, it’s what you want to book in the future too.”

Albert Pozo, VP Global Customer & IT Services at Amadeus concurs. “I’ve been to Greece and I might not want to go back to Greece. While we must take into account this historical data – there’s important stuff in there like seating preferences – we also need to take into account future intention.”

**Social data**

What is needed is a fusing of historical data and social network data with networks that are relevant to that particular product or individual and expert recommendations. With the increasing desire for experience-based travel, it is important to tap into expert content or the experiences of those with similar goals.

Then, says Albert Pozo, the customer can mould their future intentions. “Because a lot of the time people don’t know what they want next year. They’ve just had a fantastic holiday in Greece and they might go back but they’re not too sure what they’re missing out on elsewhere.”
In the report “Empowering Inspiration: The Future of Travel Search”, Amadeus points to a customer need for some context in what else is out there, both in terms of product and of price. As in any big purchase decision, customers want to “compare the price to an average.”

The challenges of the social

How useful is a traveller’s social network? The debate over the importance of customers’ social graph continues: How many of their friends have actually been to our traveller’s destination of interest, and if they have, and commented on it, would our traveller be in the market for the same kind of holiday?

As PhoCusWright noted in their European Consumer Travel Report Fourth Edition, "If social networks have demonstrated their usefulness as venues for branding and customer service, their potential to drive bookings is less clear”. The report notes that Facebook accounts for less than 3.5 percent of upstream site visits before visiting hotel, airline or an online travel agent in July 2012.

Albert Pozo at Amadeus recognises that a great deal of inspiration is drawn from social networks but argues that inspiration also comes from different groups of individuals with similar behaviours. “I think a big role in the future will be played eventually through independent sources which have credibility for the consumer because of their neutrality.”

The social web is proving particularly popular with travellers in emerging markets. In China, local OTA eLong informs us that Chinese travellers not only get recommendations from social networks but also aim to build on their social network during travel. Jason Xie, COO of eLong, notes the recent trend for “study trips” – trips organized by business schools or some industry associations for EMBA alumni or corporate executives.

Recent PhoCusWright research on China found that two-thirds of travellers active on social networks are “motivated to plan vacations by friends’ vacation updates or photos, while 56 percent frequently seek vacation advice from their friends through social networks.”

For marketers, Brazil is one of the most exciting markets in the digital space. Brand USA reports that as soon as a co-created Facebook page was launched, “we had a million fans in almost the blink of an eye.”
We see this pattern reflected in terms of sharing their travel experience via smartphone with Brazil being the most likely country to do so: 67 percent of Brazilian Millennials share their trip whilst travelling compared to a global average of just 44 percent.

The social graph, experts agree, is only one piece of the travel-recommendation puzzle. Brands like Expedia are already combining reviews and expert content, and looking at broader patterns rather than individual travel habits (e.g. of the hundreds of travellers who booked JFK to LAX, x percent added a stopover and saved money), or looking at family travel patterns to work with partners to create package options which will appeal to these travellers, like adding in free airport transfer or discounted family excursions or water-sports.

Gary Morrison, SVP and Head of Retail Expedia Worldwide, adds: “We are taking initial steps to help reviewers to categorise reviews for a particular audience to help cut through to the most relevant information. By structuring this information in a consistent way, information can be more easily combined and applied for enhanced recommendation.”

**Modification on the move**

Whereas in the past we might have asked ‘Where are all the hotels around this particular point in London?’ Sabre’s Chris Kroeger notes the shifting expectations that location-based technology has brought: “The question today is, ‘Where are the hotels in a five-block area of where I’m standing right now because it’s 10 o’clock at night and I just need to check in.’”

Travellers need more and more to be able to start their travel search process or manage their travel when they’re on the move. Others are keen to receive additional benefits whilst they’re travelling. Kyle Davis, VP of Egencia Asia Pacific, says “A typical Egencia traveller modifies their itinerary 20 percent of the time. Facilitating business travel through self-service applications, like surfacing last-minute hotel deals or early hotel checking via mobile are the way forward.”

In the leisure world, Expedia notes that 24 percent of people who make mobile hotel bookings make reservations within 10 miles of their current location and 60 percent of people who book a hotel on mobile devices begin their hotel stay within 24 hours.

Gary Morrison of Expedia adds, “We used to walk around looking up for the big hotel “Vacancies” sign to find a last-minute hotel to check-in to; increasingly we are looking down at our mobiles to find one.”
Recommendation in the regions

In emerging markets there is evidence that consumers have a special hunger for fellow travellers’ perspectives. In Expedia and Egencia research, over 85 percent of Brazilians say travel reviews are important to them whether travelling for business or leisure. According to Eric Funtowicz, Director of Distribution & Business Performance Accor Latin America, “this was not the case a few years ago, but it’s been picking up very strongly over these last few years.”

The use of travel reviews is also particularly high among Millennials:

- **82%** of them rate reviews as very important or important on leisure, as opposed to **71%** of those aged 46-65. *(The trend for business travel is similar at 77% and 65% respectively.)*

Millennials are much more likely to participate in the review process across all areas of travel. For example:

- **On hotels**, 22% of those 30 and under have written a negative review or social media posts compared with **11%** of those aged 46-65. **On flights**, the numbers are **15%** and **5%** respectively. **Indians** are most likely to submit negative reviews.

The growing volumes of reviews are helping travellers from these markets to find information not just from travellers in similar travel “modes” (e.g. business, family, single travel etc.), but also those who share their cultural perspective.

- **Online travel reviews from fellow travellers** are ‘important’ to consumers (79%) and business travellers (75%). While a large majority (70%) in Europe do not post negative reviews, the figure rises in other parts of the world such as India where **71%** have posted negative reviews.

Creeping security measures

Physical biometric infrastructure in airports, however, is likely to prove more popular with frequent business travellers than occasional leisure travellers. The latter are unlikely to want to devote time to perform the initial steps required to get their biometric data in the system. In the words of Kyle Davis of Egencia:

“A road warrior might think, ‘it makes sense for me to go this route; I will get through lines quicker. I’ll spend less time in airports, I’ll spend more time with my family.’"

Alleviating the bottlenecks at security checkpoints remains a pressing issue at airports. Amadeus’ Albert Pozo thinks that managing the airport security process more efficiently will require better use of data but also intelligent risk-class allocation by the security authorities, rather than the systematic screening of all travellers.
Data is best shared

Collaboration is important to Millennials and as Ryan Garner of GFK says, OTAs could allow the user to have a certain level of curation of the data they hold between the two, “improving the two-way relationship between the company and the traveller, then it’s going to benefit both parties and I think in the short-term that would be the smartest move.”

Also, under one roof, Big Data isn’t actually big enough to deliver valuable insight as it is often confined within the walls of one travel provider. Customers that go through any one retailer might not be the only customers of that brand. So any recommendations that brand can serve up will be skewed.

By tracking clickstreams and behavioural patterns through to the transactional stage across all aspects of the journey travel companies can draw better insights to see which patterns resulted in savings, which information led to a new direction in the search or prompted an additional purchase.
Loyalty without reward

Individuals must feel there’s a value-add opportunity as a result of sharing information. If not, says Chris Kroeger of Sabre, then they are going to be very protective of their data.

Kroeger adds: “I think [the] first nut to crack is creating the scenarios where data sharing can create value to a traveller and then convince the traveller that it’s worth it for them.”

Kroeger gives the example of a multi-component trip where a flight is delayed and, because that customer’s data has been shared with all the relevant suppliers, the traveller’s car-hire pick-up time can be extended and the hotel expects a late check-in. Equally, he can envision a world where that information is made available across the whole chain, on a conditional basis where if there’s a triggering event (such as a flight delay or a geopolitical event), it can “be used explicitly for those purposes that travellers define they can be used for.”

Naturally businesses must balance the security of customer data with the convenience of collaboration and while the customer may be happy with this, whether brands will be able to accept the risk of such collaboration remains to be seen.

Personalisation and the creepy line

While travellers benefit from customisation, many might baulk at some of the proposed lengths brands could go to achieve this. Whether consumers will ever be happy having responses to content analysed by brands on digital platforms using ‘biometric input’ like facial expression and heartbeat remains to be seen.

Tim Pritchard, Group Client Services Director at market research firm TNS UK explains that a tipping point exists between two extremes where consumers divulge too much information to a Big Brother-like internet and where they hold back all information so no brand could understand or reach them.

Knowing where that point is, says Tim Pritchard, is pretty crucial. “And of course that tipping point varies massively from one individual to the next. So I think brands have got a tough challenge to overcome that.”

Certain cultures are much more au fait with data sharing than others. Amadeus’ Albert Pozo says North American consumers fall under this category, but European consumers remain reticent to let their personal data or their historic data be used as a criteria by vendors.
The good news is that according to Expedia and Egencia research, the under-30s are much more likely to save their personal information online in order to streamline the booking process and keep their details on file.

Only 22 percent of those 30 and under around the world do not save any travel information online a figure that rises to 44 percent of those aged 46-65.

### Saving Personal Information to streamline travel (in percent)

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Q: What personal data do you save online in order to streamline the travel booking process, either for leisure/personal or business trips? (Base: All Qualified Respondents)

**An airport of the future?**

According to Ryan Garner of GFK, NFC-powered contactless ticketing hasn’t really taken off. He points instead to two emerging moves that could start to make a big difference to how airports work in the future. Firstly, PayPal’s recent initiative to provide stores with antennas to enable contactless payments and ticketing. Secondly, iBeacons, a core location API built into Apple’s new iOS 7, which allows Bluetooth devices to talk to each other without the need for Wi-Fi or GPS.

“Using iBeacons in combination with Passbook will allow contactless check-in and checkout. I think where we’re heading in the travel industry is these kind of more ambient technology, facilitating a more hassle-free journey.”

Garner adds that were RFID tags introduced for luggage tracking, a whole new customer experience of travel awaits.

Whether the airport of the future provides a truly seamless experience is all about red tape, says Albert Pozo. “It comes down to how much consumers, travellers, suppliers and travel organisations will be able really to lobby to remove the red tape – because actually the technology is there to really make huge improvements in this area.”
Trust and security in business travel

While the individual business traveller might be happy to share data for an easier ride, their employers might have something to say about it. Kyle Davis of Egencia confirms that companies are cognisant of their duty of care responsibility and are asking for more information and more assurances regarding data security. “[Companies are asking] ‘What are you doing to protect my data? How are your servers set up? What’s your business continuity plan? What’s your data security plan?’... That has really heightened a lot in recent years.”

Where is loyalty important?

There is marked regional differences in how loyalty programmes sit with travellers, with our data showing that Europeans place only moderate importance in loyalty programmes when booking flights and hotels, as many as half saying these programmes are not important. In Asia-Pacific, 75 percent say loyalty programmes are at least somewhat important for flights, with 71 percent agreeing the same for hotels. The flight figures are particularly high in South Korea (96 percent), India (89 percent), Hong Kong (95 percent) and Malaysia (89 percent).

Young and loyal

Interestingly, Millennials globally care more about loyalty programmes than their older counterparts, with 48% indicating that these programmes are very important or important when booking flights, compared to 39% of consumers aged 31-45 and 31% of those aged 46-65. The same applies for hotels at 51%, 40% and 30% for the respective groups.

In fact, just 11% of Millennials say they don’t have travel rewards points compared to 21% of 46-65 year-olds, which is surprising given how long the older group has been travelling.

Younger travellers see technology as their personal assistant and are happy to share information that makes their life easier.

But even when offered a potential incentive by a travel website, older travellers reported they are less likely than younger ones to store their travel information online, with just 36% of those aged 46-65 indicating that would sway them.

This ratio rises to 57% of Millennials if incentivised with perks like discounts, extra loyalty points and free upgrades.

Businesses which offer value which elicits loyalty can develop strong, ties with their audience, which will pay dividends in the long term.

App-athy

There are many great travel apps – but there’s no glue to hold them together. Will a macro app ever organise all our travel on the go?

According to Tim Pritchard of TNS we have reached a point already where people may have up to 100 apps on their phones but they will use no more than 10 of them on a regular basis, “and probably three are their lifeblood. The word I would start to use is ‘app-athy’.”

For mobile technology to have a real benefit to customers, smarter technology is needed. Ryan Garner of GFK sums this up as an app that says, “Right I’ve got your tickets in your passbook, I’ve recorded your preferences for the preferred rental car company and your car’s booked; its ready to leave and pickup when your flight lands and if your flight is delayed it will automatically inform the rental car company.”

With the launch of Expedia’s new itinerary functionality, customers can already view their flight details, airport terminal maps, vouchers for activities and car hire details, as well as access maps to their hotel through one device. Expedia is continuing to invest in this to create a true personal assistant for all aspects of travel that will strike the balance between relevant notifications and information overload.
Collaboration and its limits

Travel is by its very nature a fragmented industry, with transport, lodging and experiences treated as discrete segments by most. Collaboration between travel providers would make customers’ lives easier but this requires them to opt in to sharing their data.

In the networked travel technology marketplace, collaboration has always been key. According to Amadeus’ Albert Pozo, the travel industry is unique because of the “willingness between suppliers to structure content in a way that can be made available, visible and comparable with other suppliers, to provide transparency and choice to the buyer.”

While any supplier has the right to address loyal consumers directly with their own technology, a travel itinerary often demands that several suppliers must play a role. “There is no other choice than to intensify the collaboration to make as many relationships work well with technology, with intermediation,” says Pozo.

Leisure and business – two worlds collide

The ease of self-booking has meant that Millennials are often more inclined to book this way than to delegate to others. Millennials who have embraced self-booking for leisure expect the same easy, intuitive process for business travel, says Kyle Davis of Egencia.

“You look at many of the business-travel booking sites, they’re quite clunky; the logic isn’t always straightforward in how they work – you have to do a lot more clicks to complete a transaction in the old fashioned legacy online booking tools.”

Like leisure bookers, business travellers, explains Albert Pozo, “want to have all of the information pertinent to their situation in real time and want to have everything at their fingertips. It’s not enough just to have their printed itinerary and a couple of addresses.”

Travel policies vs. culture

While Millennials slowly reshape business travel, their travel antics tend to be dictated by corporate culture, say travel bookers.

Kyle Davis of Egencia explains that some companies have a really strong culture around saving money, and even if they don’t have a restrictive travel policy, employees know they’re spending someone else’s money so are respectful of that.
You may have another company, he adds, “that has a really, really strict policy you can’t do this, you must do this, but they don't necessarily have a strong culture. So policy is really important, but actually your culture overrides the policy.”

What is changing, according to Albert Pozo, is that companies are embracing the collaborative world of the Millennials and opening up their policies to traveller feedback and then, depending on that feedback, giving greater value to one supplier over another one.

**Working with markets old and new**

Every market is unique, and tourism boards must align their product to each. While it is all too easy to generalise, it is useful for tourism executives to understand any idiosyncrasies. For example, the Chinese like to travel in extended family groups encompassing multiple generations. Travel sellers in China, says Jason Xie, COO of leading Chinese OTA eLong, must therefore streamline their multi-person and item functionality.

Brazilian consumers on the other hand demand to pay by instalments, whether they are buying fuel or a holiday. Eric Funtowicz, Director of Distribution & Business Performance Accor Latin America, explains that this means hotels, for example, must have processes in place apply instalment payments, “and calculate what is the risk and the total cost.”

*VisitBritain tells us that it has a global marketing framework but a very adaptable and localised implementation. The agency’s Director Overseas Network Keith Beecham says, “If we want to have a conversation with Chinese people we feel the most effective way to do that is through Weibo and WeChat – we engage very actively with that community.”*

Where five years ago, VisitBritain had one office in China and one in India, it now has three in each and has significantly scaled down its representation in the United States.

New audiences present new challenges for suppliers. Developing technology that can flex to adapt to the priorities and preferences of multiple distinct audiences is a luxury that most travel companies simply can’t afford. OTAs and intermediaries will be an important link to amplify their opportunities to reach these audiences.
As Albert Pozo notes: You need to be able to get your product with the right attributes to the most likely buyer and investing in the technology which enables you to do that when your buyer is somebody who is eventually thousands of miles away from where you live, with very different set of profiles in economic, sociological terms.

“Packaging it so that it speaks to that audience is not a luxury; it is a need for staying competitive and for staying relevant over time.”

**I want new experiences**

New travel priorities among Millennials include an increasing demand for authentic experience-based travel – rather than landmark-centric trips – but for some new travellers like the Chinese, it’s still very much about just seeing the famous sites.

Young Indian travellers are also getting more adventurous. Where once they would have confined themselves to Singapore, Malaysia and Thailand, now, says Kadambini Mittal, Regional Director of Sales, India and Sub-Continent for Marriott, “They want to go to places like the Maldives and Mauritius because they want to get into scuba diving; they want to explore; all these fun activities are much more experimental.”

Exploiting the trend, America’s tourism organisation, Brand USA, is building partnerships with companies like Cirque du Soleil to give those visitors who have already seen the sights a different reason to visit. According to Carroll Rheem of Brand USA, “There’s a cultural, live dynamic of what we can offer as a destination that I think we’re just really starting to dig into.”

Similarly, VisitBritain is working with Expedia.com’s Facebook community to highlight Britain’s music festivals and foodie highlights for the mature US market, who are looking for more than just seeing the sights.
New infrastructure for newcomers

New markets present new challenges to a country’s tourism infrastructure like signage and hotel facilities (Chinese visitors like to drink warm water, so hotels should have kettles in their rooms), but a bigger priority is to slash the red tape surrounding visas and ensuring air capacity keeps up with demand.

In the US, Brand USA works “very closely with our government partners. The State Department and their incredible focus on supporting our marketing efforts have been hugely valuable. The Visa wait times for China have been absolutely slashed,” says Carroll Rheem.

The Americans are also working to support their domestic airports in attracting and maintaining new capacity around the world with different airline partners.

The Brits are looking at how to spread tourism beyond London and outside of the main summer season. The trend for combining business travel – which accounts for one third of inbound tourism – and leisure could help to encourage business travellers to move beyond London (currently catering for 56 percent of tourism to Britain) by adding a weekend in Oxford, Manchester, Brighton or the South Coast.

Latin American markets are significant for the US. Brazil notwithstanding, if you add the volume of Colombia, Venezuela and Argentina arrivals, the total tallies with inbound Chinese travellers. These new markets’ geographic location means that the traditional East and West Coast airport hubs do not make as much sense as gateways in the middle of the country, like Atlanta, Chicago and Houston.

Rheem sums up: “We’re really looking forward to Latin America spurring a new era of development on the aviation side.”
The older crowd

Though we have focused on the behaviours and needs of young travellers in this report, we mustn’t lose sight of the older age groups who do not want to self-book and want to be served. This trend may yet remain, with today’s Millennials requiring a more personal service when they reach their golden years.

Kyle Davis of Egencia affirms that, “The more mature travellers have very much a mindset around service. In business travel, trying to get this generation to do online booking, self-booking, they say: ‘What do you mean you expect me to book my own travel? I work very hard, I have a very important job; of course someone will do that for me.’”

In some markets, like Japan, traditional tour operators and travel agents remain entrenched. VisitBritain’s Keith Beecham reiterates that in many parts of Asia, even Australia, well over 60-70 percent of individuals still seem to prefer a traditional operator to book.

“Yes of course it’s changing, yes online is penetrating more and more, but the majority, certainly in our long-haul markets, remain bricks and mortar, so it’s about getting both the online solution right and the offline solution.”
In Conclusion

The online travel industry has made great headway since its birth in the 90s. But the digital-native generation born that same decade in the West, in India, in Brazil, in China, is now, according to our data, travelling for business and pleasure more than any other age group, and is pushing for our offerings to evolve to suit their lifestyles.

The Future of Travel will be collaborative, co-curated, fluid and flexible and highly personal. This is very much a do-it-yourself lifestyle, where travel can be inspired, planned and booked with a few clicks on a personal device; where a trip is not a trip unless it is both fulfilling and experiential, and shared across social networks before, during and after.

The Expedia brand team has already made significant investments in mobile, creating a streamlined travel experience where mobile acts as a true personal assistant providing notifications if your flight is delayed, guiding you in the airport and reminding you when to check out of the hotel, storing your activity vouchers. Now the task is to leverage the insights into how customers are interacting via mobile, anticipate where the Expedia brand can leverage the innate advantages of mobile devices and where it is possible to collaborate to further build on these initial steps.

On the business side, technology is also making travel ‘personal’ again. For example, Egencia’s fully redesigned native iPhone application, Egencia® TripNavigator, dramatically improves the in-trip experience of business travellers. Envisioned as a comprehensive system, TripNavigator gives users step-by-step directions during their entire journey, much like a GPS device offers driving directions. The app provides an interactive view of trip events, listing the specific next logical action a traveller should take – for example, checking in for a flight or hotel. TripNavigator also leverages Egencia’s Intelligent Service Platform, a new initiative aimed at smartly infusing technology into how Egencia delivers customer service, travellers benefit from personalised, contextual support from Egencia Travel Consultants when they call in.

We’ve learnt that the travel industry has some way to go to achieve our vision of an industry where online travel agents inspire customers with intelligent, co-curated recommendations as personalised as they would be in a bricks and mortar travel agency.
The challenges are sizeable. Developing ‘open question’ search (from specific search) will mean understanding Big Data in a way that threatens to drown us in a sea of information and data-privacy issues. The solution involves working collaboratively with the traveller and understanding which paths lead to a transaction, a saving or positive feedback.

As Gary Morrison, SVP and Head of Retail, Expedia Worldwide, notes: “With localised websites in over 31 countries, Expedia is one of the few brands with a truly global insight into travel patterns across the globe. Combining search and transactions for flights, hotels, car hire, destination services and reviews all in one place means we are also one of the few brands to see the full customer journey from search through to the return and (if we get things right), the next booking. This puts us in unique position to understand travellers.”

“Our history and our scale affords us unparalleled insight into travel patterns, but what matters most is having the right technology and the right people to manipulate and interrogate data to convert this into insight. Our heritage is technology and understanding technology, and understanding travellers is what we believe will position us to deliver this streamlined, intelligent vision of the future.”

A supplier who understands and anticipates customer expectations, and produces inspiring travel ideas, builds loyalty and intimacy with their buyers. As Albert Pozo of Amadeus says, “When it comes to really creating native demand by loyalty, online travel is in its infancy and there’s a high payback if you do it right because the savings on traffic acquisition could be quite massive.”

If done effectively, OTAs can become the true personal travel assistant.

And, while leisure travel can learn a lot from business travel management companies in terms of retained loyalty, the corporate travel arena now looks beseechingly at leisure suppliers. Why? A new generation of business travellers all over the world increasingly demand the same levels of control and flexibility over their bookings as they now enjoy as leisure travellers. They also see no reason why a business trip should not segue into one of pleasure.
Rob Greyber, President of Egencia, notes: “Millennials want to travel smarter and adopt new technology faster. Technology is accelerating this trend by making business travel ‘personal’ again. By providing contextualized, multiplatform travel solutions and services on the go, like Egencia TripNavigator, we are directly supporting the future traveller’s need for speed, flexibility and instant access to global travel content.”

The travel industry must also ensure that the efficiency and slickness of the booking process continues on the road. Once the transport element of travel becomes seamless and connected, when one element of the journey goes wrong, time-poor travellers will not be unduly inconvenienced. To do this, governments, tourist agencies, airlines, hoteliers and other travel providers must collaborate more than ever before.


Asia remains the powerhouse for world tourism…According to the IMF's World Economic Outlook released in October 2012 Asian GDP as a whole is likely to grow by 5.4% [in 2012] and by 5.9% in 2013. 29% of Asians plan to travel more in 2013 up from the 26% figure last year...52% plan similar travel levels in 2013. Taking all these factors into account IPK currently predicts a healthy 6% increase in Asian outbound travel in 2013.

2 Source: PhoCusWright, US Online Travel Overview, Twelfth edition, November 2012

3 Source: PhoCusWright’s Eastern Europe Online Travel Overview, July 2012

4 Source: PhoCusWright’s India Online Travel Overview, Sixth edition, June 2013

5 Source: PhoCusWright, China Consumer Travel Report, September 2013

6 Source: PhoCusWright, Moneyed, Mobile & Massive: China’s New traveller Class published October 3rd 2013

7 Source: PhoCusWright’s Latin American Online Travel Overview April 2011

8 Empowering Inspiration: The Future of Travel Search: PhoCusWright research, researched and written by Carroll Rheem. Sponsored by Amadeus. February 2012


10 Source: PhoCusWright, China Consumer Travel Report, September 2013

Thank You to Our Future of Travel Report Contributors

Accor Hotels

Accor, the world’s leading hotel operator and market leader in Europe, is present in 92 countries with more than 3,500 hotels and 450,000 rooms. Accor’s broad portfolio of hotel brands - Sofitel, Pullman, MGallery, Grand Mercure, Novotel, Suite Novotel, Mercure, Adagio, ibis, ibis Styles, ibis budget and hotelF1 - provide an extensive offer from luxury to budget. With more than 160,000 employees in Accor brand hotels worldwide, the Group offers its clients and partners 45 years of know-how and expertise.

Accor in Brazil: Accor is the leader in this market with 173 hotels and aims to increase its network to 250 hotels by 2015. The Group is expanding notably in the economy segments through ibis and ibis budget. For example, Accor recently announced the addition of 25 ibis budget establishments to its network under franchise contracts with local partners. For further information please visit www.accor.com. The Accor press kit can also be viewed at http://www.accor.com/fileadmin/user_upload/Contenus_Accor/Presse/Dossiers_Presse/EN/accor_press_kit_august_2013.pdf

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Amadeus

Amadeus is a leading provider of advanced technology solutions for the global travel industry. Customer groups include travel providers (e.g. airlines, hotels, rail and ferry operators, etc.), travel sellers (travel agencies and websites), and travel buyers (corporations and travel management companies).

The Amadeus group employs around 10,000 people worldwide, across central sites in Madrid (corporate headquarters), Nice (development) and Erding (operations), as well as 71 local Amadeus Commercial Organisations globally.

The group operates a transaction-based business model. For the year ended December 31, 2012 the company reported revenues of €2,910.3 million and EBITDA of €1,107.7 million.

Amadeus is listed on the Spanish Stock Exchange under the symbol “AMS.MC” and is a component of the IBEX 35 index.

To find out more about Amadeus please visit www.amadeus.com

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Brand USA

Brand USA was established by the Travel Promotion Act to spearhead the nation's first international marketing effort to promote the United States as a premier travel destination and communicate US entry/exit policies and procedures. Formed as the Corporation for Travel Promotion, the public-private entity began operations in May 2011 and does business as Brand USA. Through its consumer-facing brand and call-to-action – Discover America – Brand USA inspires people to explore the United States of America's boundless possibilities.

This first ever effort is expected to put the United States on equal footing with other countries' tourism efforts and bring millions of new international visitors to the United States who spend billions of dollars during their travels – thus creating thousands of new American jobs each year.

Brand USA works in close partnership with the travel industry to maximize the economic and social benefits of travel – all at no cost to US taxpayers.

The organization is supported by contributions from the private-sector that are matched by fees paid by international travelers to the Electronic System for Travel Authorization (ESTA) program. ESTA is an automated system implemented by the Department of Homeland Security in 2008 that determines the eligibility of travelers from 37 international markets to travel to under the Visa Waiver Program (VWP). ESTA authorizations are generally valid for multiple trips over a period of two years or until the traveler’s passport expires, whichever comes first.

For industry or partner information about Brand USA, visit www.TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at www.DiscoverAmerica.com

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**eLong**

Our Vision: To become China's leading hotel booking marketplace

eLong, Inc. (Nasdaq: LONG - News) is a leader in online hotel reservations in China offering consumers a leading hotel network of more than 212,000 bookable domestic and international properties in 200 countries worldwide. eLong uses innovative technology to enable travellers to make informed hotel and air ticket booking decisions through its convenient website and mobile (iPhone, iPad, Android, and Windows Phone) applications and easy to use tools such as destination guides, photos, virtual tours, maps and user reviews.

eLong provides 24-hour customer support and the ability to fulfill domestic and international air ticket reservations across China. eLong's largest shareholders are Expedia, Inc. (Nasdaq: EXPE) and Tencent Holdings Ltd. (HKSE: 0700). eLong operates websites including www.elong.com and www.elong.net.

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GfK

GfK is one of the world’s largest research companies, with around 13,000 experts working to discover new insights into the way people live, think and shop, in over 100 markets, every day. Through customized research programmes and rich market sales data with, we provide unique insights into how customers interact with your brand, products and services. With technology changing rapidly and filtering into every aspect of the travel industry, GfK has a deep understanding of the implications for clients. Technology is becoming a key point of differentiation for brands and customers alike and GfK can identify the best opportunities for harnessing these tech developments. From tracking actual bookings on outbound and inbound travel (online and offline), to running pricing scenario models for specific types of travel booking, we are uniquely placed to capture the whole customer journey and to analyse changing trends in the marketplace. In particular, our Leisure Travel Monitor (LTM) is a uniquely created market intelligence service for the total UK outbound holiday market. The LTM service provides the most comprehensive and accurate picture of the UK outbound holiday market, comprising air inclusive travel holidays (AIT or package holidays), ex-UK cruises, international flights from the UK and overseas holiday accommodation. Working in partnership with the travel industry, we provide independent, forward booking information based on real, live bookings. The accuracy and detail of the LTM service means that it is alone in promoting both an understanding of the total market picture, the volumes and the trends, and also the market categories and dynamics, such as destination, pricing and product mix.

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Marriott

As Marriott International has grown to be a leading lodging company with more than 3,800 properties in 72 countries and territories worldwide, we remain grounded in a set of core values: put people first, pursue excellence, embrace change, act with integrity and serve our world.

Our relentless focus on innovation and action fuel the way we do business. With the most powerful brand portfolio in the world, we set the bar for the hospitality industry.

Yet our strength lies in more than just a business model. It’s our unique and storied heritage – a way of doing business – that enriches relationships and instills a passion for who we are. Together, we are opening doors of opportunity...for our guests, owners and franchisees, and associates.

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Sabre Travel Network

We’ve made innovation our business from the very beginning. From building the first computer reservations system in the world, to leading the way for online travel, to delivering cutting-edge travel solutions.

The business of travel is ever-changing. Stay static and you’ll be left behind. In this dizzying pace, you need a partner who can help you succeed. Only our Sabre® Red™ travel solution gives all the tools you need to stay ahead.

• stay ahead of the pace of change
• stay ahead with game-changing innovation
• stay ahead of the competition

But that’s just the beginning of why successful companies work with Sabre®. Here are five reasons to choose us as your business partner:

• Unique expertise
  Benefit from decades of combined industry experience. We have committed our careers to the success of your business and ours.

• Innovative end-to-end solution
  Drive customer loyalty and power business performance with the Sabre® Red™ travel solution.

• Industry-leading customer service
  Rest assured, we are here to help you 24/7/365. From local support to online services and global customer service, we are focused on your success.

• Unmatched track record of agency and corporate advocacy
  Count on us to stand up for your interests. We take a tough stand to ensure balance in the marketplace.

• Socially responsible company
  Know that we care. Our commitment to the communities in which we live and work is woven into our company culture.

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TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long-established expertise and market-leading solutions.

With a presence in over 80 countries, TNS has more conversations with the world’s consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, one of the world’s largest insight, information and consultancy groups. Please visit www.tnsglobal.com for more information.

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VisitBritain

VisitBritain is the national tourism agency, responsible for marketing Britain worldwide and developing Britain’s visitor economy.

A non-departmental public body, funded by the Department for Culture, Media and Sport, we work with partners in the UK and overseas to ensure that Britain is marketed in an inspirational and relevant way around the world. Our partners include government agencies such as UKTI and British Council, airlines and operators, global brands such as Samsung and the English Premier League as well as the official tourism bodies for London, England, Scotland and Wales.

Our priority is to deliver a four-year match-funded global marketing programme which showcases Britain around the world, attracting new visitors from the tourism growth markets of Asia and Latin America and reinvigorating our appeal in core markets such as the USA, France and Germany. This campaign aims to secure an additional £2 billion in visitor spend.

Through our global reach, we aim to increase visitor spend to all parts of Britain and improve Britain’s ranking in the eyes of international travellers.

Our mission: Building the value of tourism to Britain, working in partnership with the industry, nations and regions to generate additional visitor spend.

Our vision: To inspire the world to explore Britain.

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About Expedia

Expedia.com is the world's leading online travel site, helping millions of travellers per month easily plan and book travel. Expedia.com (http://www.expedia.com) aims to provide the latest technology and the widest selection of vacation packages, flights, hotels, rental cars, cruises and in-destination activities, attractions, services and travel apps. With the Expedia Best Price Guarantee, Expedia.com customers can get the best rates available online for all types of travel.

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