

Open the door to opportunity

Collaborating to win in the hotel
distribution playing field



Foreword

Whenever we travel, especially for business, we tend to want to feel at home whilst we're away. Nothing beats a home cooked meal, your own shower and a big comfy bed.

With customers having incredibly tailored content at their fingertips, making sure your home away from home is as comfortable as can be is a top priority for hotels. And those that get it right can ensure loyal guests.

Creating a perfect guest experience, an unforgettable experience, is not something only hoteliers strive for. Lately, we see more and more how travel agents, travel management companies and other travel sellers are moving towards this traveler-centric, holistic experience too.

But the industry is conservative and fragmented and all of us need to think about what we are doing to ensure there is a role for us going forward. At Amadeus, we are passionate in our pursuit of better technology that improves our customers' and, in turn, their customers' experiences. We will aim to succeed by working together to help everyone shape their own journeys.

We are continually in contact with our customers and partners to discuss, debate, and brainstorm about how to overcome these challenges and trends to stay ahead of the curve of ever changing consumer preferences.

This is why we gathered around 140 people from around the world to have an open and honest discussion about the landscape of today's industry, the guests of tomorrow, and the expectations that we

not only need to meet, but exceed. Our Amadeus Hotel Exchange event at the end of last year in Nice, was a place to learn debate and to get energized with fresh ideas and new ways to collaborate to shape the future of hotel distribution.

While clearly there is no one size fits all solution, we see there are three key trends all of us need to watch, learn from, and make a strategic decision on how to tackle: scale & diversification, personalization and innovation. By taking a deeper look at these trends, this paper identifies key recommendations for hotel distribution industry players, both big and small, on what to keep an eye out for going forward.

At Amadeus, we think that innovation and technology are the key to tackling these new customer behaviors. We want this paper to be the follow up to the conversations we had with our customers at the Amadeus Hotel Exchange and over the past year. We need to keep that conversation going: the pace of change is only going to get faster, and the already competitive landscape will see more new entrants from all corners. The topics highlighted in the paper can anchor those conversations.

Now is the time to put customers at the heart of everything we do and explore new ways of operating. It's also time to work together, explore ideas and not be afraid to try things, fail and then move on.

We look forward to hearing your thoughts on this paper, and to working together to inspire better guest experiences, overcome industry challenges, and shape the future of travel.

Peter Waters

Director of Hotels, Mobility and Insurance,
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About the author



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Freelance journalist

Linda Fox is a freelance journalist specializing in travel technology and distribution. As well as her role as Managing Editor for tnooz, she regularly contributes product and trends feature articles to business travel titles including the Business Travel Magazine and Buying Business Travel. She also undertakes a range of corporate writing including contributions to client magazines as well as white papers and thought leadership pieces.

Prior to her freelance career she covered hotels and technology news for Travel Trade Gazette for seven years. Linda joined TTG from Caterer & Hotelkeeper where she worked on the features desk for more than five years.

Methodology

When I first started learning and writing about the hotel technology and distribution landscape 20 years ago, there was no Facebook, iPhone and certainly no Airbnb. Industry experts often talk about the unprecedented technological change and point to how quickly new devices and platforms have gained critical mass. Think about it: the giant online travel agencies we now take for granted were not prominent ten years ago. It's a full-time job keeping up with the rapid pace of change, let alone trying to evolve with it, and all signs are that it is only going to increase in speed. I'm still learning, but this paper rounds up the key trends I am currently seeing.

At the end of last year, Amadeus gathered around 140 senior executives from the hotel industry across the globe (representing hoteliers, online travel agencies, travel management companies and more) at the Amadeus Hotel Exchange event in Nice. The goal? To engage in an open discussion on technology and distribution trends in the hotel landscape and suggest some steps going forward. During the event, the audience was polled on a number of issues such as the challenges for 2018 facing the industry in the short to medium term. The following paper includes quotes, polling results and videos of industry experts to look at some of those challenges in more depth, highlighting some of the debate from the event.



What's shaping the industry?

What's shaping the industry?

The hotel sector has never before experienced so much rapid change in how it presents its inventory to consumers; how they, in turn, want to engage with and access that inventory, and in how the competitive landscape has been turned upside down.

The trend of consolidation

Never a sector to be caught napping, hospitality is beginning to embrace the latest trends head on.

Part of that has inevitably meant rationalization in the shape of consolidation and we have seen plenty of deals in recent history. Marriott's acquisition of Starwood¹ is perhaps the most prominent example but other deals and partnerships across the hotel distribution market are also noteworthy. AccorHotels' \$2.7 billion purchase of Fairmont Raffles² and Expedia's acquisition of HomeAway³ three years

ago are prime examples of how the accommodation landscape is changing. There has also been a great deal of activity in distribution technology too, such as Priceline's steady amassing of hotel technology companies including PriceMatch, Buteeq and Hotel Ninjas⁴.

All this M&A activity is a big change in itself. It might make an independent property feel a bit left out in the cold. Or, equally, make hotel giants question how to best balance their direct versus indirect channels.

The trend of personalization

It's the age of the new consumer. They own themselves and want to be recognized as individuals. Disruptors are delivering on the consumer expectation of an instant experience, with mobile sophistication fueling this trend.

Technology and content giants such as Amazon and Facebook have helped drive consumer expectations to the extent that their most recent experience becomes the benchmark for the next. What this means in real terms is that split second response times for hotel results and the ability to find reviews of even the most remote hotel have become the norm. And personalized recommendations, such as what they get from the likes of Netflix, are expected in other industries.

Hotels and their partners in the hospitality space are now having to:

- _know their customers and strive to be in constant contact with them
- _ensure interactions foster trust and demonstrate that the brand cares
- _think digital, because that's where their customers are, and continue to innovate to improve the guest experience

And, a very large part of knowing and interacting with those customers is being where they are, be it online, through messaging platforms, or through voice search.

How these trends are pushing the industry to innovate

All of these developments, M&A's and consolidations, and the drive towards an ultra-personalized world point in one direction: the consumers, and how the hospitality industry is targeting them and beginning to personalize its services accordingly. This industry is fortunate in that it has the consumers' attention for a lengthy period of time, giving hotels a unique position to capitalize on this.

Hotels can provide the best night's stay for a guest, supported by the best user experience during the booking process as well as through all that emerging technologies have to offer. Now, more than ever, there is a need to stay on top of changing consumer purchasing behavior, whether it be direct or indirect channels, or a channel not yet invented.

However, embracing these changes and staying on top of trends requires investment. The appetite to invest in startups as they emerge in the hospitality space should act as a signal to hotel chains, big and small, that the sector is ripe for change. In 2016, CB

Insights⁵ highlighted 60 startups that could impact hotel operations. Many of the names were challengers in the distribution space, while others came from the alternative accommodation segment. Notable investment in startups in and around the hospitality sector include \$37 million for Hotel Tonight last year⁶ and Expedia's \$26 million investment in ALICE⁷.

This investment activity also demonstrates the need for more flexible thinking and the willingness to try, and fail, with new ideas. There is a feeling among established hotel players that if they don't innovate from within, someone else will. Many are already taking steps to address the innovation challenge. Marriott International set up its TestBed accelerator to work with startups a year ago⁸, while Hilton launched at the end of 2017 its Innovation Gallery to trial new concepts⁹. Others, such as AccorHotels and Mövenpick, are trying to bring about change from within by bringing digital natives on to the executive team, to ensure innovative thinking becomes part of their culture.

"It's important to invest today even if the business return has not been proven. This is a big cultural change for many organizations."

Steve Kopp

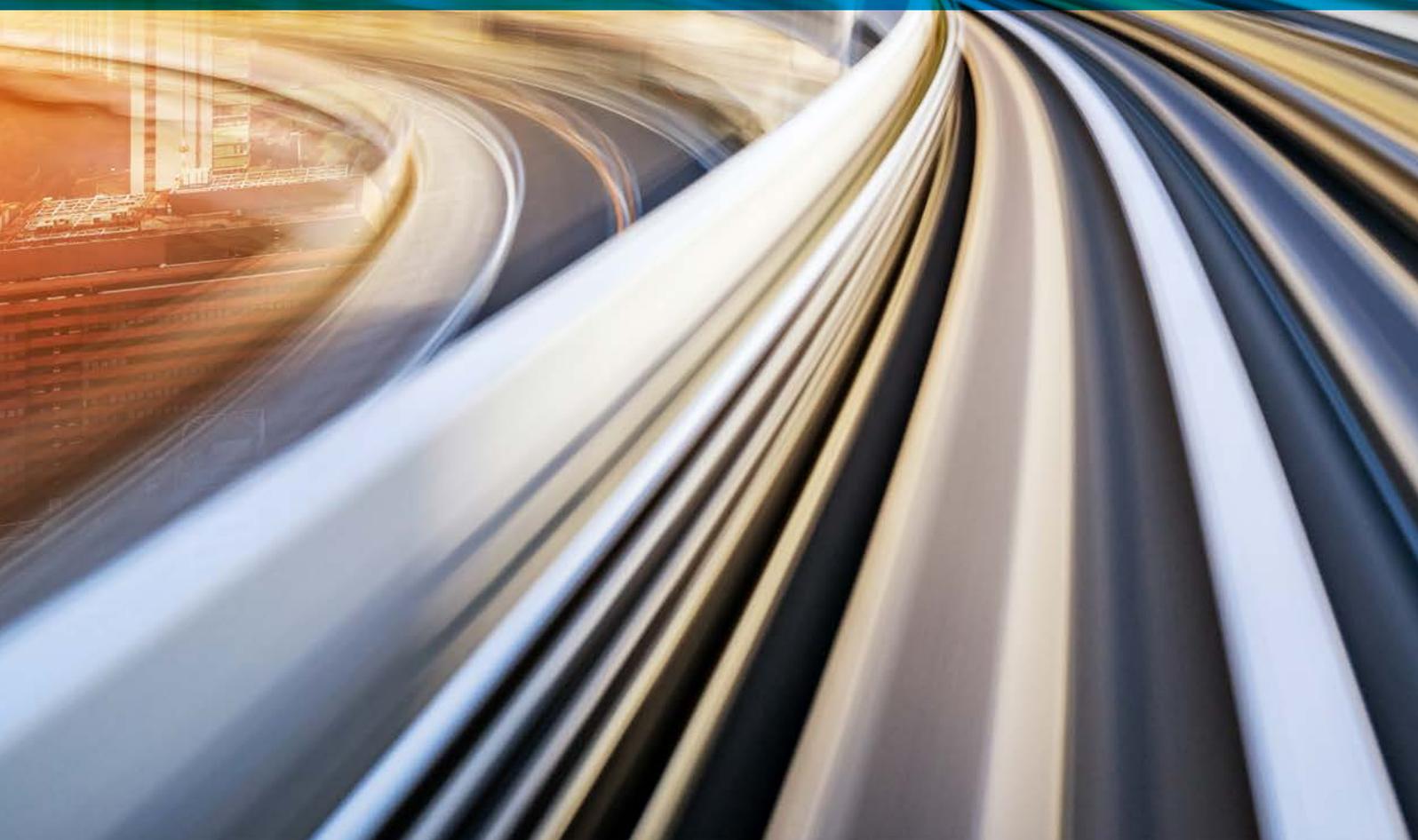
Head of Amadeus Horizon 3, Amadeus

Expert opinion

I see really three fundamental changes that have happened. Firstly large-scale consolidation, and M&A. We've seen the rise of the large, big, online travel agency players. But we've also seen consolidation on the hotel side. A second big change has been a drive towards personalization, everybody at the moment is trying to target a personal experience with the customer. And last but not least, we've seen many more players coming in with specialty product. And I think all three of these trends are going to continue."

Peter Waters

Director of Hotels, Mobility and Insurance, Amadeus





Scale and diversification

Scale and diversification

With unprecedented change rocking the industry to its foundations, many hotels are left wondering what their best course of action is.

Large players, it seems, have been pursuing a two-pronged strategy: they're getting larger via mergers and acquisitions and they are also creating an increasing number of what is termed 'soft brands', where independent properties join a large chain but retain a

good degree of autonomy. This concept enables larger players to not only continue to grow and increase their penetration but also introduce new ideas that are potentially targeting new markets or segments. One example is Hilton's Curio concept¹⁰, which is described as a 'collection of unique hotels each with their own history and character'. At the same time, Marriott International with its Moxy brand and AccorHotels with its Jo&Joe concept are targeting millennials.

These strategies raise a number of questions. For large players, how many brands is too many? And for smaller players, is scale the only way forward?

The thinking from hotel giants is that if there's a concept that can reach a specific marketplace or certain customer segmentation, then there is a reason for that brand to exist. While that might be treading on what has traditionally been the remit of independent hotels and small chains, the drivers are different. Hotel giants, like their smaller counterparts, must keep moving and innovating in order to demonstrate value to customers. But that presents its own set of challenges in terms of trying to drive innovation at scale.

What's interesting is that, to combat these challenges, many of the large chains are adopting a 'think global but act local' approach. For some players, that means treating each hotel and its team as a single property with the sole aim of providing an unforgettable experience for each guest.

Others have taken the definition of local and broadened it, so that they are also providing services to the community at large. AccorHotels is the best example of this with its recently launched AccorLocal concept¹¹ where the hotels promote their services to non-guests. This could mean access to services provided by the hotels such as fitness classes and spa facilities, or using the hotels to pick up deliveries or dry cleaning.

Independent hotels and small chains don't have the problem of implementing innovation at scale. Their advantage is in being agile: they can implement new concepts, products and services quickly, and then learn and adapt to meet needs. The ability to recognize and personalize services for guests is also an advantage over larger players, who are often labelled cookie cutters and lacking in personality. Norway-based

Smarthotel, with four properties, is a good example of a small chain in action. The company's aim is to personalize as much as possible and it prides itself on their time invested in getting to know its guests - to the point of providing a fridge for one guest every time he stays.

There is now widespread recognition that, although acquisition is one way to grow and increase presence, it has to be combined with a guest-centric approach and innovative thinking. Maintaining the status quo is not an option when travelers have so much choice at their fingertips. Whether small or large, hoteliers have to demonstrate the value they provide.

Insight from key industry players

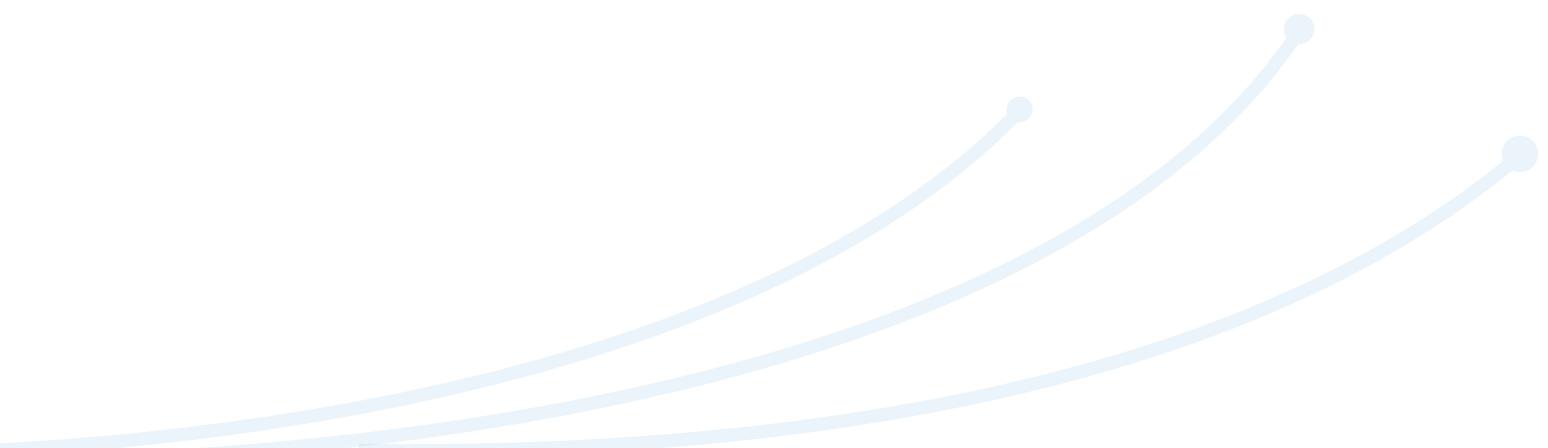
The audience at the Amadeus Hotel Exchange was polled on whether big players and small players would continue to co-exist in such a competitive landscape. Participants were roughly split between whether the market needs to provide all these concepts and brands, with about one third of the audience saying there's room for both big and small players to ensure that consumers have enough choice.

Ultimately, hotel choice comes down to the destination and reason for traveling. Some small properties manage to build up such a great word-of-mouth reputation that they will always have high repeat rates. This is balanced with large branded city-center properties who offer a consistent experience to the weary road-warrior.

About a quarter of the audience felt small players would become the breeding ground for startups and innovation. These results are more surprising in that it is the larger players that have so far set up innovation labs and made moves to work with startups.

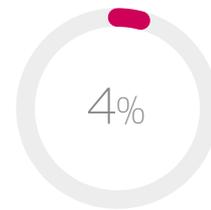
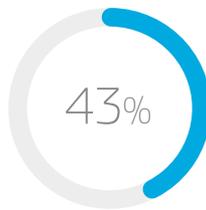
The remaining industry experts gathered believed small players would focus all their attention on knowing and servicing the individual guest. This is an area where small properties have always excelled and are likely to continue to do so.

A further poll asked industry experts to rate the following factors as keys to success in such a competitive landscape: people, technology or rates. The audience overwhelmingly came down on the side of the importance of people. After all, running a property has always been about the professional nature as well as the individual characters of the people within. Technology was also highlighted as a key success factor, demonstrating that efficient integrated systems are no longer a nice-to-have but rather a critical element of a hotel's distribution strategy.



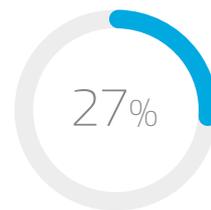
What do you see as key success factors in today's highly competitive market?

- People - at the end of the day running a hotel is a people business, the in-hotel experience is what will make guests come back
- Technology - it's critical to have integrated, efficient systems to stay ahead
- Rates - in an online world where people are shopping around, price remains all important



Will big and smaller players continue to co-exist?

- Yes, the market needs both to provide the consumers with enough choice
- Smaller players will focus all their attention on knowing and serving the individual guest
- Smaller players will ongoingly become the breeding ground of start-ups and new concepts
- There will be a backlash against the larger brands as differentiation becomes a challenge



Expert opinion

“Consolidation is a hard trend in the industry and if you look at the European market, OTAs are for sure going to be more consolidated than in other regions. But there's always a place for the local heroes to give something different to different clients. You have to combine both worlds.”

Ricardo Fernández
Chief Strategy Officer, Destinia



3 key recommendations to prepare for scale and diversification

1

Large or small, everyone must demonstrate the value they provide, whether through that personal touch, loyalty schemes, the latest technology or a combination of all three. Ongoing innovation will be what sets the best from the rest.

2

Large players should continue to play on the breadth of choice they offer to consumers to attract different groups and segments.

3

Smaller players must continue to use their agility to try new concepts and do what they do best - foster close relationships with customers.



Personalization

Personalization

It certainly became a buzzword in the past couple of years but it also left many in the hospitality industry scratching their heads. After all, it's what good hoteliers do already -welcoming guests and trying to anticipate their needs.

In the hotel industry these days, you not only need to know your customer but also have enough usable data on their preferences and, from there, have the capability to apply it in a meaningful and relevant way. While that might sound easy for a boutique-style property of 50 rooms, or a small independent chain with a loyal following, it becomes harder for large chains who welcome a significant proportion of transient guests. These hotels might be able to invest more in CRM systems, but their guests may not even want to provide this insight into themselves or their preferences. The result is often targeting guests by cluster, rather than as individuals, which brings its own set of challenges. Are they business travelers, are they leisure travelers, or are they both?

An interesting finding from a Chartered Institute of Marketing survey, shows marketers feel under 'greater pressure to reinvent the customer experience as a result of technology disruptors', such as Uber¹². These are companies that were quick to take advantage of all that channels, such as mobile, offer in terms of a really slick consumer experience. It is now up to hotels to replicate this sort of user experience, which means rethinking how they interact with guests before, during and after a stay. Hoteliers already say they are seeing the demand for more choice from travelers and for their experiences to mirror the sorts of experiences they have as a consumer.

One of the areas this can be seen in is loyalty schemes. In early 2016, large chains including Hilton and Marriott International invested in campaigns to boost their loyalty following and attract business away from intermediaries to book via their own direct channels¹³. However, there is some debate in the industry over whether that investment might be more wisely put towards small changes that make a big difference to the individual guest.

Some hotels are waking up to the potential of what newer technologies can bring and how to use them to engage with their customers in the channels they choose - whether it be voice-powered in-room technologies, WhatsApp, Facebook or the more traditional brand dotcoms and intermediaries' websites. Research released in late 2017 by digital marketing specialist Eagle Eye revealed that, for younger generations, (16-24 year olds) the propensity to opt for these newer channels was far higher than for older generations¹⁴.

But whoever the traveler, digital channels are of great benefit to hotels because they mean a trail of digital crumbs for hotels to gather and act upon.

As the hotel industry grapples with the pace of change and moves forward with new technologies and ways to engage guests, there is one final challenge it will have to contend with: the need to be mindful of personal data and privacy issues. The future is about more than just knowing your customers. It is also about showing you understand and care about their needs.

Insight from key industry players

During the Amadeus Hotel Exchange, the audience was asked whether Millennials are really that different in behavior when it comes to a hotel stay. More than 50% of industry executives gathered felt that these digital natives, who have grown up with the internet and mobile, are used to receiving instant results and communications and therefore need to be engaged with differently.

A further 20% of industry experts believed that millennial travelers are looking for an experience in everything they do and their hotel stay is no different. This runs contrary to the perception from many in the industry that the segment is no different to any other. Current trends, however, such as the blending of business and leisure trips would seem to indicate otherwise.

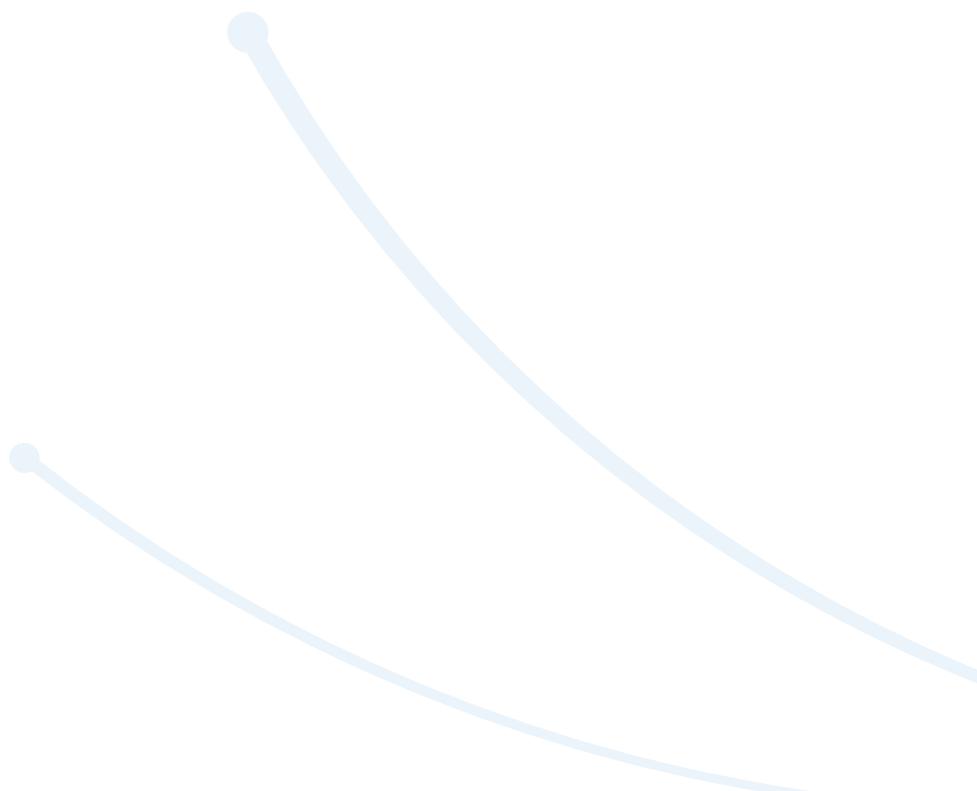
Another poll asked industry experts for their views on the importance of customer privacy going forward. About half of those gathered believe that the industry will have to take its lead from customers who will

ultimately decide what they want to share. This is a fine line and could make or break a company as well as significantly damage the industry's reputation.

A further 24% of industry experts believe customers are increasingly happy to share their information if they feel there are gaining something in return. Whether this is a result of the age of social media and sharing remains to be seen.

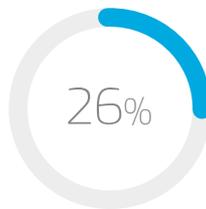
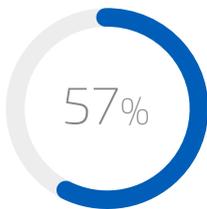
The remainder of respondents had diametrically opposed views on customer privacy. About 12% believe that a post-privacy world has made the concept of privacy redundant, while the rest see customer privacy as of the utmost importance.

This is an area where the hotel industry is going to have to tread carefully. New legislation is on its way in terms of how companies treat data, and the trust factor will become increasingly important in terms of how consumers view brands.



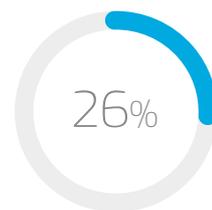
Are millennials really that different in behaviour when it comes to their overnight stays?

- They've grown up with online and mobile and don't have the patience for anything that takes more than five seconds
- Yes, they're looking for an experience in all things and have no brand loyalty
- It's all a question of education. If you explain what is available to them and why, they're the same as everyone else



How important do you think customer privacy will be going forward?

- It's important to let the customer decide what he/she is comfortable sharing
- More and more customers are happy to share their information if they see they get some value from sharing
- We have already entered the post-privacy world, where the concept of privacy is redundant
- Customer privacy is of the utmost importance, that's why the rules and regulations are there



Expert opinion

“Now we’re not just selling a destination, we’re selling an experience. And to do that you need the technology so customers are able to find the experience easily online, they have got to be able to search seamlessly to find that experience that they want. But it’s also about personalization for the actual market as well. It’s about supporting each market in the currencies they want to work with, with the banking set up they require, in the language that they require, not only from a call center perspective but from a content provision perspective as well.”

Emma McNamee,
Head of Sales Planning & Delivery, JacTravel



3 key recommendations to prepare for personalization

1

Get to know your customers, their past purchases and their preferences. In addition, be realistic about what your business can actually invest in to really personalize the experience. Remember that often it is the little things that make the biggest impact.

2

Try not to get caught up in the latest trends that may be short-lived. Think instead of keeping an eye on the market, the impact of developments on your brand and the need to provide a consistent experience.

3

Data security and privacy are key. Seek advice on what the latest regulation means for your brand. Be clear about what customers are willing to share, and what they are getting in return.

Innovation



Innovation

It's easy for hotels to stick their heads in the sand and hope all the startup businesses biting at their heels will go away - they won't.

Innovation does not have to be about revolutionary change. Definitions vary but it can be just a new product, service or way of doing something. Companies, such as Expedia¹⁵, have been testing and learning strategies for a number of years, whereby ideas are quickly put into practice to gauge customer feedback and then adopted or dropped depending on their success. The key element here is to keep moving.

As soon as there is a new trend such as chatbots, a mobile application or a startup that is getting traction, these companies are on top of it. Recently Expedia demonstrated its Alexa booking service¹⁶ while Priceline announced BookingGo¹⁷ as the new ground transport platform for Booking.com.

Many within the hospitality industry are adopting the same philosophy. Previous chapters of this report highlight how hotel companies such as AccorHotels, Hilton and Marriott International are embracing change through their innovation labs and by partnering with startup accelerators.

But smaller companies shouldn't feel that this area is closed off to them either. In many ways they can move faster, try new ways of doing things and learn from them more quickly than the hotel giants. As one small online player puts it: "The flexibility small companies have is a key advantage." Examples of this include Destinia. The Spain-based online intermediary claims many firsts such as its trials of blockchain. The key here is being prepared to try things, fail and then move on.

There are also startups emerging on a weekly basis addressing many different areas of the guest experience and offering products and services to help improve processes. Both Dazzle¹⁸, a voice-activated application which uses Amazon Echo to provide hotel and local information to guests, and HiJiffy, an artificial intelligence-based chatbot, have been working with Marriott International to test their services in a live environment. Others, such as Conichi¹⁹, use beacons to recognize when a guest enters a hotel and alert the front desk with their preferences. Hotel intermediary, HRS, has integrated this technology into its mobile application to ensure a smoother check-in for guests.

What these applications have in common is their use of mobile. Mobile devices have changed how we live our lives and how we interact with, not only each other, but also the brands we choose to do business with. In business travel particularly, mobile devices have quickly become a vital part of every trip for everything from itinerary management and expense processes to keeping in touch with family. Research conducted by the GBTA Foundation reveals that 61% of business travelers have had a mobile app of one of the seven major hotel chains on their smartphone in the past year and 54% have had at least two apps from major chains²⁰.

The dream for many in business travel is a seamless experience: one all-encompassing service with trip details stored alongside tickets and reservations, where travelers have the ability to manage and change reservations on the fly. Where their flight and hotel bookings are integrated, so the hotel automatically knows when to expect them and if there has been any disruption.

While there are already many signs of innovation around the hospitality industry, hoteliers also need to keep an eye on the future. There is more coming. Mobile devices will continue to play a huge role, especially in the development of voice. It is widely tipped as the biggest disruption because of the potential it has to change how consumers interact with brands and their products and services again.

And what of the role of augmented and virtual reality in the hotel space and blockchain? The business case for these emerging technologies is being explored with many good marketing examples already out there. The potential is likely greater however in terms of their use in distribution, to target different segments as well as to make processes more efficient.

Insight from key industry players

Hotel industry executives were asked to project forward and anticipate what might change hotel distribution in business travel in five years' time.

More than half of the audience came out in favor of personalization. This is hardly surprising. If, as an industry, we know who our guests are and what their preferences are, it is much easier to create the best possible experience for them.

A further 20% of the audience highlighted voice as a big driver of change going forward. The interesting

thing is that voice will in itself help the drive towards personalization. Some tech giants are using machine learning to constantly improve their voice platforms. The more a user interacts, the better the response will become.

Industry experts are less sure about the potential for blockchain at this stage in its ability to disrupt hotel distribution in business travel. That said, many companies are already experimenting with different use cases, including loyalty and hotel distribution, in preparation for if, and when, it catches on.

Which driver will change Hotel Distribution in business travel 5 years from now?

- Personalisation
- Voice (Amazon echo, Google Home etc)
- Blockchain
- Chatbots, messenger
- FAANG, WeChat



Expert opinion

“For a long time the pace of change in technology in hotels has been not only frustrating for the hoteliers themselves but also for the end customers and their expectations. I think what’s really exciting now is that we’re really poised to give hoteliers what they want to enable them to delight their customers through every touch point in the hotel.”

Jo Stanford,
Managing Director EMEA of Hospitality, Amadeus



3 key recommendations to prepare for innovation

1	2	3
<p>Step back from day to day operations and take a strategic view of some of the latest trends. Ask your team whether they could be doing things better or more efficiently. Stay agile but stay strategic.</p>	<p>Don't beat yourself up if you can't make huge change quickly. Think about and ask others for input on small, incremental changes that could still make a huge difference. If you can instill a more innovative culture, you're more than half-way there.</p>	<p>Accept that you can't do it alone and be open and flexible to partnering and co-creating with industry players – big and small. The only way forward is collaboration and there are experts everywhere.</p>



Conclusion

Conclusion

The challenges facing the hotel industry have never been so great. Consumer expectations have changed, driven by the rapid pace of technology development. Simultaneously, megatrends of industry consolidation, personalization and startup innovation are adding pressure. How the industry addresses all these challenges is critical.

Many hotel players have come to recognize that while they were focused internally, new challengers were rising up. Now, the industry must focus on what it does best and be willing to partner externally to drive innovation. In such a highly competitive industry, and one which has traditionally not been good at acting as one, this is no easy feat.

But now is the time to start.

As one executive from a large hotel chain puts it: “Guys like Ctrip are not waiting for a trend coming from the US. They are using platforms for payment such as PayPal or messaging systems such as Kao Kao in Korea. We have a responsibility to move faster. If you’re not considering what is happening in Asia, you are out of the scope.”

This sentiment is echoed by Peter Waters, Director of Hotels, Mobility and Insurance Amadeus, who says:

“If we don’t get together as an industry we are exposing ourselves to irrelevance. We need to think about what we are doing as an industry to ensure there is a role for us going forward, and that includes Amadeus.”

We hope this paper, its insights and its recommendations inspire you to collaborate on solutions to evolve as an industry and meet the challenges we are all facing head on. Start by asking questions internally across a cross-section of employees about what your strategy should be. Talk to industry colleagues for their thoughts and look outside hospitality for how other industries are addressing some of the same challenges. But, most of all, don’t be afraid to just start something.



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