

The  
Phocuswright<sup>®</sup>  
Conference

# TRAVEL'S RENAISSANCE

SMARTER | BOLDER | BETTER

[www.phocuswrightconference.com](http://www.phocuswrightconference.com)

# POST-SHOW REPORT

# 2021 CONFERENCE OVERVIEW

For more than 25 years, The Phocuswright Conference has delivered an unbeatable combination of compelling content, top-tier attendees and electrified atmosphere. It's where ideas are born, partners are found, strategies are honed and deals are done.

In 2020, we moved the entire event to a virtual platform. While the insights and healthy debate continued, it was no substitute for a live event. That's why this year's conference was a special reunion of executives, innovators, investors and entrepreneurs.

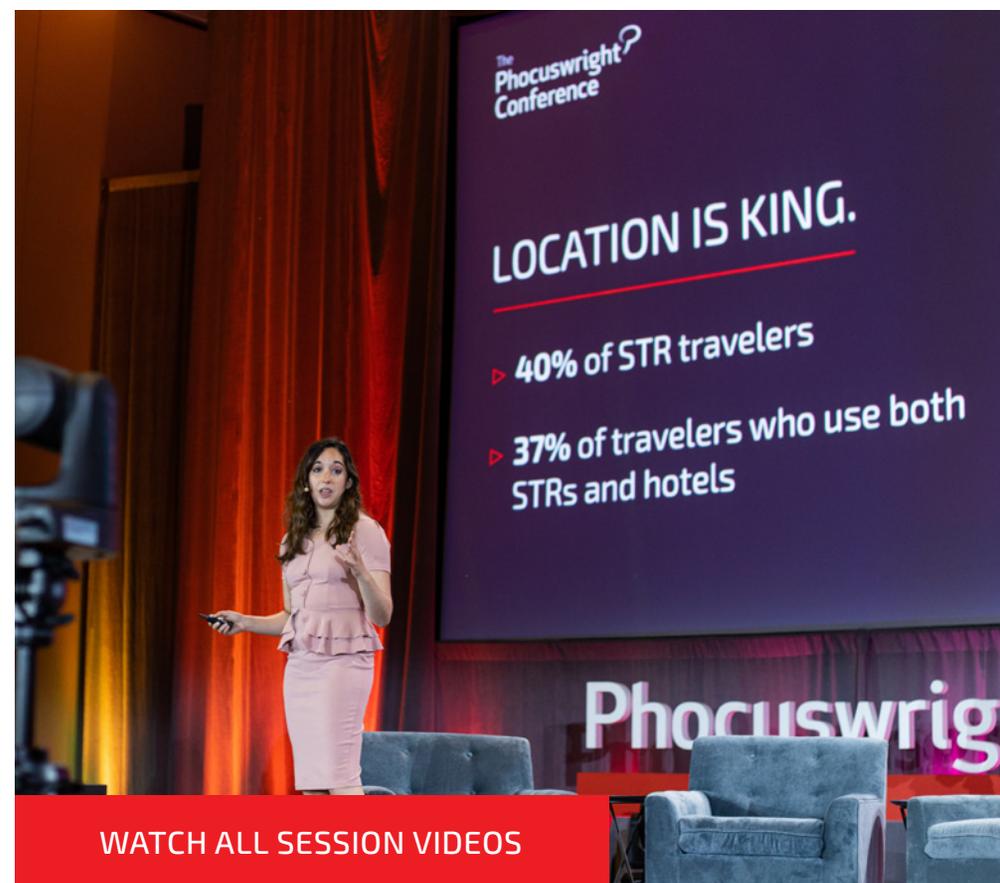
Nearly 800 of the travel industry's most influential leaders from around the world attended The Phocuswright Conference 2021 in-person in Ft. Lauderdale/Hollywood, Florida, with hundreds more online. Thousands of viewers continue to watch the conference session videos on demand and via the Phocuswright YouTube channel.

Attendees reveled in social events, mingled in the always buzzing Exhibitor Showcase and brought their unique perspectives to highly-targeted, small-group networking events. Finally together again, the industry's brightest minds leveraged opportunities in one-on-one engagements, Industry Roundtables, the Young Leaders Summit, the Startup Program and even an early-morning empowerment workout on the beach.

The most visionary thinkers and innovators with the "Next Big Idea" poured all of their pent-up energy into the conference to learn, re-connect and innovate.

The Phocuswright Conference continues to be an important platform for companies, colleagues and partners to connect. That's why we've expanded our program to include unique sessions and networking opportunities. As always, attendees listened intently to the highly anticipated Center Stage sessions, interacted in breakouts and the Exhibitor Showcase, shined in the spotlight of the PhocusWire studio and found high-level networking throughout each day.

Learn more about The Phocuswright Conference at [www.phocuswrightconference.com](http://www.phocuswrightconference.com).



## CONFERENCE THEME

### **Travel's Renaissance: Smarter, Bolder, Better**

Travel is still waiting for a full recovery, but signs of hope are everywhere. 2021 may not have been the breakout year we hoped for, but it sure was better than 2020. Once again travel businesses are hiring (if they can!), posting sales and serving customers. Though the pandemic may never truly go away, there is optimism. Now is travel's renaissance as it awakens to greater energy and bright possibilities – a time to engage with colleagues, customers and partners with fresh perspective. Considering how hard we have worked to get here, it is imperative to get this moment right.

A big step toward improvement is to evaluate our missteps as well as our successes. Is there something broken that needs fixing? An old habit holding us hostage? Anticipating growth and change is one thing, but charting a course that is profitable, fulfilling and meaningful is another. We must take stock of the past as we refocus our efforts on the next prize – a healthy and safe environment, an improved travel experience, revitalized destinations, streamlined processes, faster response times, and a fair and diverse workplace. Striving for perfection is folly but improving on the past makes us stronger. There is no better time to make good choices, before fully ramping up, as we consider who to hire, how to organize and where to invest.

Along with being stewards of travel comes great responsibility to care for the people and places that keep the industry humming. Doing the right thing for our customers and the environment should not have to be painful. Things may never be the same, and the industry may not fully recover for years. But after surviving all this time, there should be no hesitancy to make bold moves. In the silence of shutdowns and lockdowns, companies have had plenty of time to reassess and ideate. All our experiences – gratifying or troubled, planned or happenstance – have brought us to this very moment. Now is not the time to loop backwards, but to look ahead, breathe deep and dive in. Look at our reflection and see the changes that have taken place, maybe without us even knowing it. Our thoughts and behaviors are different. We are a lot wiser.

The Phocuswright Conference explored this shift and continued on the path to Smarter, Bolder, Better.

The  
Phocuswright  
Conference

# TRAVEL'S RENAISSANCE

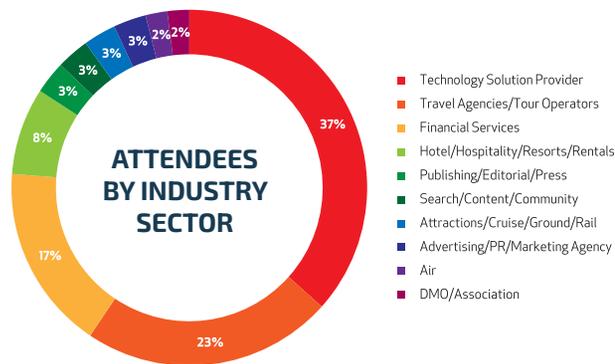
SMARTER | BOLDER | BETTER



# AUDIENCE OVERVIEW

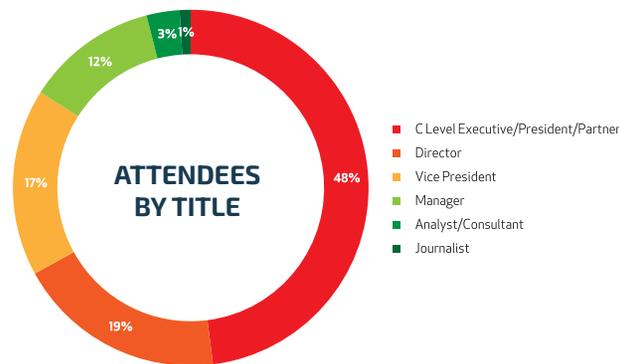
## DREAM DEMOGRAPHICS

The Phocuswright Conference 2021 attendees represented dozens of countries from every travel, tourism and hospitality sector. No other conference provides access to such an elite and motivated group of prospective clients.



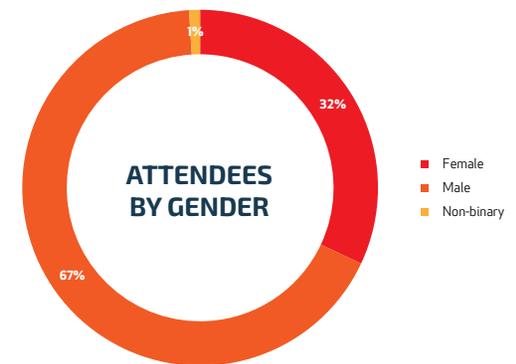
## THE PEOPLE YOU WANT TO MEET WERE THERE

The number one reason to attend The Phocuswright Conference is networking. Other attendees are eager to meet you and build a partnership.



## STRIVING FOR GENDER EQUITY

An important initiative at Phocuswright is to attract a diverse group of speakers and attendees that represents the overall traveling population. We continue to aim for goals in increasing gender, racial and identity diversity, with an emphasis on featuring speakers on Center Stage that more racially and gender-diverse.



## (STILL) A GLOBAL EVENT

Although borders only re-opened to international travelers one week before the event, there was an overwhelming presence from international attendees. 26% of our attendees came from overseas, solidifying the global impact of The Phocuswright Conference. In addition, a large international audience joined the conference online. Attendees represented over 40 countries as well as the top travel businesses from around the globe.



## TESTIMONIALS

“ We all wanted a real-world conference again badly, but we didn't expect it to be this good!

“ The Phocuswright team was engaging and everywhere. There were top notch speakers who seemed to want to be there and hang out beyond their session.

“ Great setup, major players and the networking is easy.

“ I was very, very impressed with the event organization and the professionalism of the staff. From start to finish, I felt supported and well-advised.

“ Every minute was impactful. Fantastic networking, great food.

“ As a first-time attendee of a travel conference, I was unsure of what network opportunities there would be but came away with many impactful conversations, new friends, and an investor commitment. The entire event was expertly executed and I found just about every minute to be valuable.

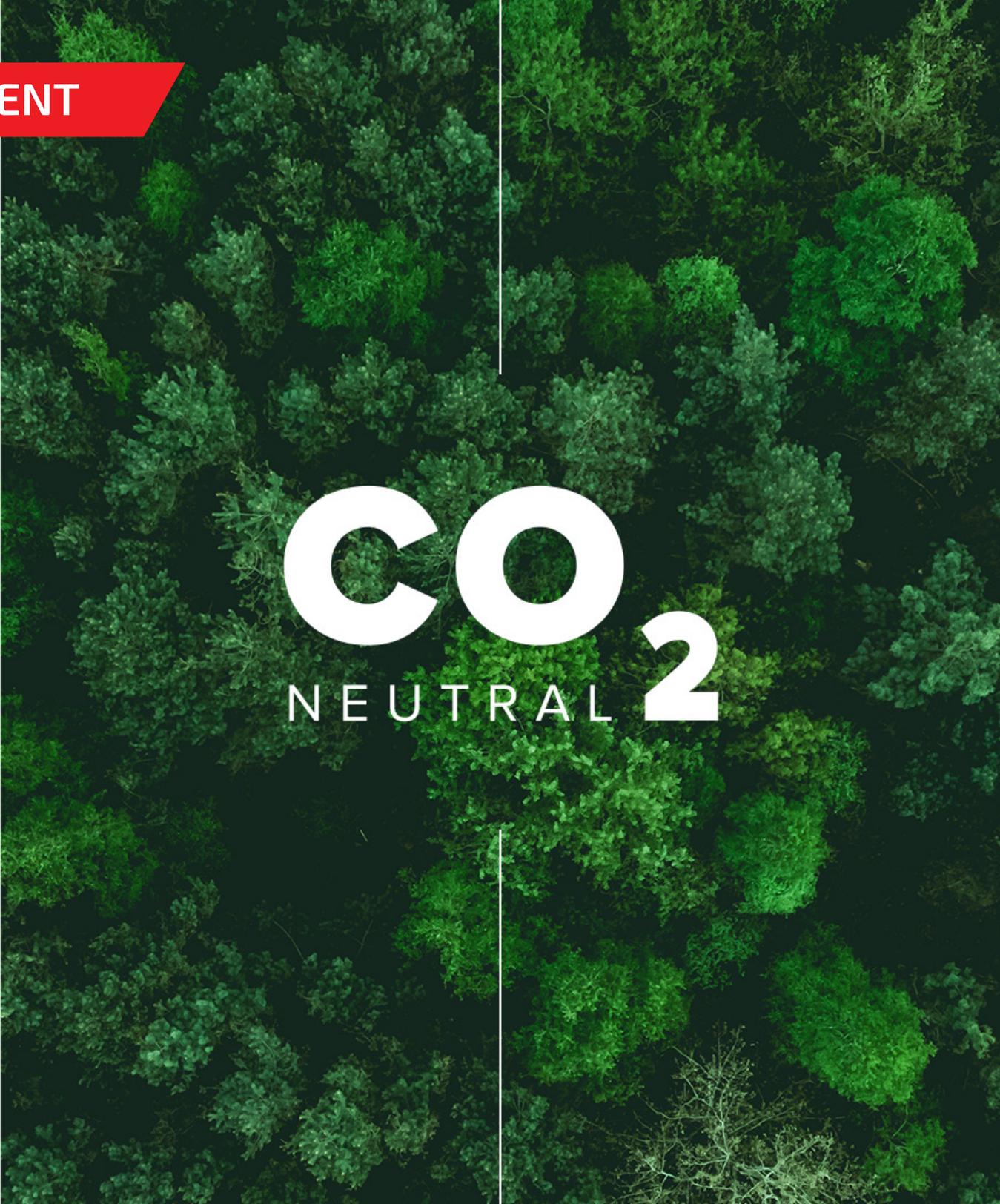
# A CARBON NEUTRAL EVENT

In a company first, we were very proud to offset the carbon footprint of The Phocuswright Conference including waste, power and water usage, food and beverage and transportation emissions of nearly 800 attendees.

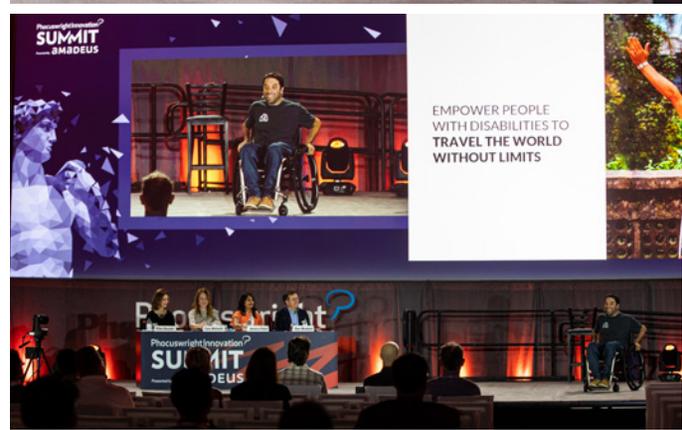
After assessing the event's environmental impact estimate, we worked with Verra, ClimeCo and the Climate Action Reserve to offset the event's estimated carbon emissions through The Envira Amazonia Project, a tropical forest conservation project in Acre, Brazil and a Phlogiston N2O Abatement program in Florida.

The aim of The Envira Amazonia Project is to reduce deforestation and mitigate associated greenhouse gas emissions, engage local communities, and reforestation of vulnerable tree species in an effort to preserve the Project Area's rich tropical biodiversity.

Phocuswright is committed to being a leader in environmentally-conscious events by taking proactive, voluntary measures.



CO<sub>2</sub>  
NEUTRAL



# CENTER STAGE

Center Stage at any Phocuswright event offers the highest-quality content with ample opportunities to interact with speakers and fellow industry experts.

At The Phocuswright Conference 2021, Center Stage sessions featured an unrivaled speaker lineup that consisted of entrepreneurs, industry veterans and pioneers, CEOs and other leaders from all corners of the travel industry to engage in fruitful discussion and debate about recovery.

The theme of this year's conference, "Travel's Renaissance: Smarter, Bolder, Better," was meant to be aspirational, but this is not a quick recovery. Travelers are willing, but there are still many challenges concerning borders, safety, and shortages. It might be pre-mature to say we're in a phase of enlightenment, but at least we can all see a lot clearer now versus one year ago. Personal and professional trials over the past 20 months have changed us in one way or another, and that has led to a sense of gratitude. Coming out the other side with your business intact (whether you raised billions in capital (and are paying it back) like Expedia or received a government check to make payroll), has made survival a true victory.

As we know not everyone fared the same. Travel is a diversified industry with many subsegments, each with its own customer proposition and business model. Those boasting the most success on Center Stage were short-term rentals (Guesty, Airbnb, Vrbo) while hotels still struggled with labor shortages and the slow return of business travel (though positive signs are everywhere). Another big pivot (Hopper into

fintech) shielded the travel booking app from the worst of the downturn. It makes sense that uncertain times would lift risk-based products like insurance and price protection. Some took risks (Kayak trials hotel ownership with Life House) while others pared down (Expedia sells Egencia, Classic Vacations, pulls back from activities, to sharpen its core focus).

There was some controversy, especially around sustainability. We all recall that the earth was healing itself during the early lockdown and many vowed to continue efforts to clear the air. There were pledges to cut down on carbon emissions, stay away from over-popular destinations (e.g., Barcelona, Venice) and use alternative transportation such as rail to curb the use of fossil fuels. "We're not anywhere near where we need to be just yet," admitted Jeremy Sampson of The Travel Foundation. With recovery in sight, will the industry (and travelers) fulfill those promises, or, as Steve Hafner said, will it just continue to pollute, especially as it ramps back up.

Center Stage speakers tackled some age-old questions (Will NDC change modern retailing? How can we provide a consistent traveler experience?) with renewed vigor and intelligence. Others challenged the industry with fresh ideas. For example, self-sovereign identity (SSI) can support truly frictionless travel while allowing us to maintain control of our own personal data. This is something we all can like (a single code that identifies our history and preferences at all points of our journey - anonymously!). The Decentralized Identify Foundation (DIF) continues to build use cases for Hospitality and Travel. Even though it's early days, we must pay attention.





Of course, there was talk of money. Even though the number of start-ups receiving funding has plummeted according to Phocuswright (from 400 in 2016 to just 12 in the first half of 2021), there's still plenty of money to go around for existing businesses. Among our Center Stage companies, TripActions raised \$430 million in capital this year and Spotnana, \$41 million. For Hopper, \$600 million was raised to date.

The popularity of SPACs could lead to more public travel companies – a good thing for the industry, according to investment analysts on stage. SPACs pave the way for a faster IPO (can be six months from idea to IPO, according to Christoph Schuh of Lakestar). But a lot of people, according to Chris Hemmeter of Thayer Ventures, will lose their shirts in the SPAC market, to say it nicely. Inspirato, HotelPlanner, and HomeToGo were among those travel companies taking the SPAC route to an IPO, and more will follow.

In many ways The Phocuswright Conference was about ramping up, hearing each other's stories, and planning for a full recovery in 2022, '23 or maybe '24, depending on your outlook. After all, there was so much optimism when the U.S. opened its borders in early November and more than one quarter of attendees were from outside the country – a wonderful surprise. But as we celebrated, parts of Europe were locking down again, the popular Christmas markets in Austria and Germany shuttered for yet another year. Even if the pandemic finally abates, there will be many issues left in its wake, like the labor shortage. Cowen's Helene Becker said the industry needs to replace up to 35,000 pilots. And Stacy Ritter of Visit Fort Lauderdale challenged the hospitality industry to fix wages (too many workers are "busting their butt" for \$10/hour). If not, will we be paying extra for housekeeping?

Our expert analysts curated a program that benefited attendees all along the online distribution chain and presented first-to-market data and analysis from recent travel research, with insights into traveler sentiment, barriers to overcome and restoring confidence in traveling, behavioral changes the industry should expect and the flexibility consumers want when it comes to planning and booking trips

The program focused on bright possibilities on the winding path to recovery, highlighting ways to create healthy and safe environments, an improved travel experience, revitalized destinations, streamlined processes, faster response times, and a fair and diverse workplace.

For our virtual attendees, the online platform was the perfect forum for lively chat, interaction between attendees and speakers and live sessions to facilitate this crucial engagement.

[WATCH ALL CENTER STAGE VIDEOS](#)

[VIEW PHOCUSWIRE COVERAGE](#)

# CENTER STAGE SPEAKERS

## Zeek Coleman

Senior Director, Product Marketing  
**Adara**

## Sam Shank

CEO  
**HotelTonight**  
Head of Guest Experiences  
**Airbnb**

## Brad Gerstner

CEO & Founder  
**Altimeter Capital**

## Alex Zoghlin

President and Chief Executive Officer  
**ATPCO**

## Blanca Menchaca

Co-Founder & CEO  
**BeMyGuest**

## Margo Yates Martinez

Communications and Marketing Team  
**Bloomberg**

## Jake Fuller

Managing Director and Digital  
Services Analyst  
**BTIG LLC**

## Caryn Seidman-Becker

Co-Founder, Chairman and CEO  
**CLEAR**

## Helane Becker

Managing Director  
**Cowen Inc.**

## Mark Mahaney

Senior Managing Director and Head  
of Internet Research  
**Evercore**

## Peter Kern

Vice Chairman and Chief Executive  
Officer  
**Expedia Group**

## Nelson Boyce

Managing Director, Travel  
**Google**

## Vered Raviv Schwarz

President & COO  
**Guesty**

## Chris Silcock

Executive Vice President & Chief  
Commercial Officer  
**Hilton Worldwide**

## Fred Lalonde

Co-Founder and CEO  
**Hopper**

## John Prince

Co-Founder & President  
**HotelPlanner**

## Felipe Pereira dos Reis

Regional Director, Airport,  
Passenger, Cargo and Security  
**The Americas, IATA**

## Megan Morikawa

Global Director of  
Sustainability Office  
**Iberostar**

## Heather Dahl

CEO  
**Indicio.tech**

## Duarte Simões Moreira

Chief Financial Officer  
**Indie Campers**

## Carroll Rheem

Founder and CEO  
**iolite group**

## Steve Hafner

CEO  
**KAYAK**

## Christoph Shuh

Partner  
**Lakestar**

## Kaliya Young "Identity Woman"

Ecosystems Director  
**COVID Credentials Initiative, Linux  
Foundation Public Health**

## Steve Singh

Managing Director  
**Madrona Venture Group**

## Christian Watts

CEO  
**Magpie**

## Siew Hoon Yeoh

Founder  
**WIT**  
Editorial Director  
**Northstar Travel Group Asia**

## Vajid Jafri

Founder  
Chairman and CEO  
**Onriva**

## Jed Kelly

Executive Director,  
Equity Research  
**Oppenheimer & Co. Inc.**

## Kevin May

Editor-in-Chief  
**PhocusWire**

## Mitra Sorrells

Senior Reporter  
**PhocusWire**

## Linda Fox

Senior Reporter  
**PhocusWire**

## Madeline List

Research Analyst  
**Phocuswright Inc.**

## Alice Jong

Director, Research  
**Phocuswright Inc.**

## Lorraine Sileo

Senior Analyst  
**Phocuswright Inc.**

## Charuta Fadnis

SVP,  
Research and Product Strategy  
**Phocuswright Inc.**

## Amit Saberwal

Founder and CEO  
**RedDoorz**

## Robert Cole

Senior Research Analyst,  
Lodging and Leisure Travel  
**Phocuswright Inc.**

CEO  
**RockCheetah**

## Traci Mercer

Senior Vice President,  
Marketplace Segments  
**Sabre**

## Aaron Gowell

CEO  
**SilverRail**

## John Mangelaars

CEO  
**Skyscanner**

## Chris Hemmeter

Managing Director  
**Thayer Ventures**

## Jeremy Sampson

CEO  
**The Travel Foundation**

## Isabel Hill

Acting DAS for National Travel and  
Tourism  
**The U.S. Department of Commerce**

## Mark Corbett

Founder  
**Thrust Carbon**

## Luuc Elzinga

Founder & President  
**Tiqets**

## Noah Brodsky

President  
**Travel + Leisure Group**  
Chief Brand Officer  
**Travel + Leisure Co.**

## Cory Garner

Group Co-CEO & President of  
Distribution  
**Travel Technology Research (T2RL)**

## Ariel Cohen

Co-Founder & CEO  
**TripActions**

## Steve Kaufer

CEO  
**TripAdvisor**

## Axel Hefer

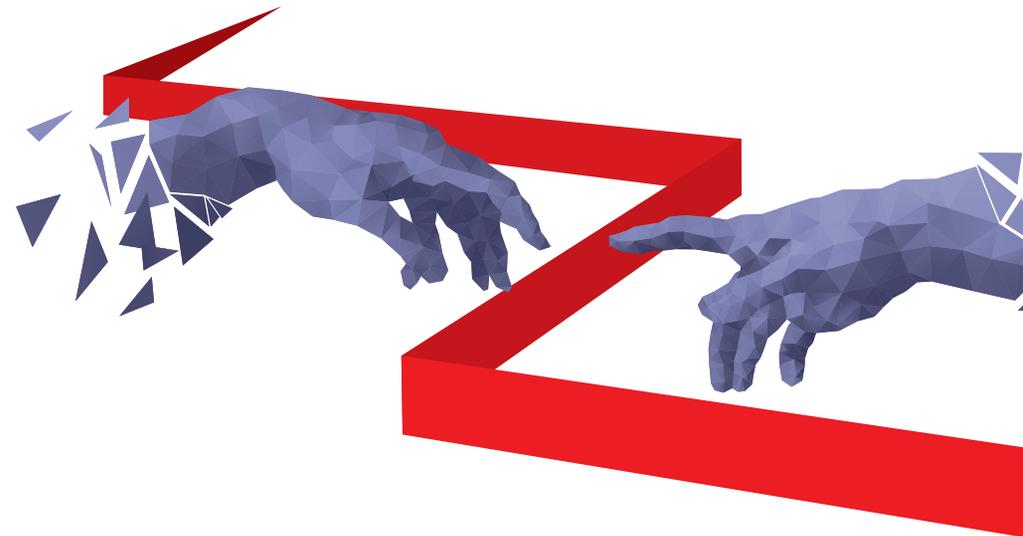
Managing Director &  
Chief Executive Officer  
**Trivago**

## Stacy Ritter

President & CEO  
**Visit Lauderdale**

## Anu Hariharan

Partner  
**YC Continuity**





# INNOVATION

The award winners of the latest Phocuswright Innovation Platform programs, Summit and Launch include RoomPriceGenie, UpStay and youtip. Phocuswright Innovation Summit and Launch provide the premier stages for global innovators to demonstrate new ideas that are set to change the travel industry.

Eight innovators, selected from PhocusWire's Hot 25 Startups for 2022, presented at Summit, the pitch competition for startups, and nine presented at Launch, the platform for scaleups and established companies to introduce new products. The winners represent the best of this elite group.

- youtip, a rapidly deployable digital tipping system, won the Summit Most Innovative Startup of the Year Award, as voted by the Dragons.
- RoomPriceGenie, an automated pricing solution for independent hotels and serviced apartments, was runner-up for the Most Innovative Startup of the Year Award and also took home the Summit: People's Choice Award.
- UpStay, a post-booking yield optimization platform for hotels, claimed the Launch: People's Choice Award.

As the world attempts to fully reopen from the pandemic, creative solutions are needed more than ever to help travel companies aggressively optimize revenue and automate processes, to put more money in the pockets of workers, and to better help travelers with shopping for, booking, and protecting their trips. This year's group of innovators brought forth excellent solutions in all those areas and more.

## PhocuswrightInnovation<sup>?</sup>

# 2021 INNOVATION PLATFORM WINNERS

### PhocuswrightInnovation<sup>?</sup> SUMMIT

#### SUMMIT MOST INNOVATIVE STARTUP OF THE YEAR:

**WINNER: DOUG MILES, CEO, YOUTIP**  
**RUNNER-UP: MARVIN SPEH, CO-FOUNDER, ROOMPRICEGENIE**

**youtip**

 RoomPriceGenie

#### SUMMIT PEOPLE'S CHOICE WINNER:

**MARVIN SPEH, CO-FOUNDER, ROOMPRICEGENIE**

 RoomPriceGenie

### PhocuswrightInnovation<sup>?</sup> LAUNCH

#### LAUNCH PEOPLE'S CHOICE WINNER:

**MAÍNA PIETROBELLI, HEAD OF BUSINESS DEVELOPMENT, UPSTAY**

**UPSTAY**

View all of this year's innovators and the alumni [here](#).

See the videos of all Summit and Launch demonstrations [here](#).

548 innovators have now participated in Phocuswright's innovation events since the first Travel Innovation Summit in 2008. This esteemed group of Phocuswright Innovation alumni has brought countless innovations to the market. 387 of them have raised funding, adding up to over \$6.3B collectively, and 97 have been acquired.

## INNOVATION SUMMIT DRAGONS

### Ellen Keszler

CEO  
Clear Sky Associates

### Eric Hart

CFO  
Expedia Group

### Jessica Patel

SVP - Innovation  
Expedia Group

### Dee Waddell

Global Managing Director, Travel & Transportation Industries  
IBM

### Chris Hemmeter

Managing Partner  
Thayer Ventures

### Cara Whitehill

Founder  
Unlock Advisors

## INNOVATION LAUNCH: PHOCUSGROUP

### Mitch Gross

Managing Director  
12 Squared Growth

### Aileen McCormack

Chief Commercial Officer  
CarTrawler

### Adam Harris

CEO  
Cloudbeds

### Lisa Katsouraki

SVP Corporate Development  
Etraveli Group

### Kurien Jacob

Principal  
Highgate Ventures

### Ed Silver

CIO  
iSeatz

### Chinmai Sharma

President, Americas  
RateGain

### Noreen Henry

CRO  
Sojern

# Phocuswright Innovation

## BY THE NUMBERS

INNOVATORS

548

FUNDED

387

RAISED

\$6.3B+

ACQUIRED

97

As of November 2021



# STARTUP PROGRAM



Pitching isn't everything, nor is it the only thing. This private event - with participation only by acceptance - enabled startups to network with investors, industry experts and fellow travel tech startups, while Phocuswright helped facilitate one-on-one meetings. Relationships deepened at curated roundtable discussions, happy hours and throughout the conference.

## MENTORS

### Ed Silver

CIO  
iSeatz

### Ted Stimpson

President  
GoCity

### Ellen Keszler

President & CEO  
Clear Sky Associates

### Jessica Patel

SVP New Partner Solutions  
Expedia Group

### Lisa Katsouraki

SVP Corporate Development  
Etraveli Group

### Chris Hemmeter

Managing Partner  
Thayer Ventures

### Adam Harris

CEO and Cofounder  
Cloudbeds

### Jim Lockheed

Investment Principal  
JetBlue Technology Ventures

### Miriam Moscovici

Sr Director, Research & Innovation  
BCD Travel

### Kerri Zeil

Head of Amadeus Startup Launchpad  
Amadeus

### Guarav Tuli

Partner  
F-Prime Capital

### Will Phillipson

Serial Travel Tech Entrepreneur  
Kyte

### Mitch Gross

Managing Director  
12 Squared Growth

### Mat Orrego

CEO and Cofounder  
Cornerstone Information Systems

### Flo Lugli

Principal  
Navesink Advisory Group

# YOUNG LEADERS SUMMIT

SPONSORED BY **hotelbeds**

Each year, Phocuswright brings together the industry's best and brightest travel leaders aged 35 and under to be part of this elite group. The Young Leaders Summit program recognizes the brilliant minds shaping the future of the travel industry and is a launching pad for the next generation of travel luminaries to connect, debate and collaborate.



## MODERATORS

### Aurélie Krau

Consultant  
**FESTIVE ROAD**

### Evan Konwiser

EVP Product, Strategy, Comms  
**American Express Global Business Travel**

### Walter Buschta

Vice President, Marketing  
**Phocuswright**

## SPEAKERS & MENTORS

### Lauren Atlass

Regional Sales Director Americas  
**Hotelbeds**

### Carrie D. Fabris

Chief ReFramer  
**CareerFrame**

### Sam Shank

CEO, HotelTonight & Head of Guest Experiences  
**Airbnb**

### Nelson Boyce

Managing Director, Travel  
**Google**

### Steve Hafner

CEO  
**KAVAK**

### Steve Kaufer

CEO  
**Tripadvisor**

### Traci Mercer

SVP, Marketplace Segments  
**Sabre**

### Fred Lalonde

CEO  
**Hopper**

### Madeline List

Research Analyst  
**Phocuswright**

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# MORE NETWORKING & ACTIVITIES

## INDUSTRY ROUNDTABLES

When it comes to highly-targeted, small-group networking, Industry Roundtables offer the ultimate interest-based networking. Phocuswright curated these intimate, off-record curated roundtable discussions based on business interests, moderated by industry experts and Phocuswright analysts.

The roundtable discussions were an opportunity for attendees to meet like-minded peers and industry experts in an informal setting to examine issues as they relate to the table topic.

At a large, global event like The Phocuswright Conference, providing a forum for small groups was an important way to facilitate meaningful conversations and networking opportunities for participants.

## TRAVELPAYOUTS EMPOWERMENT RUN

The second day of the conference started with an early morning exercise session on the beach, led by a professional personal trainer. This unique event gave attendees the opportunity to start their busy day with a present mind and served as a reminder that within a busy week of activities and sessions, mental health and a clear focus goes a long way in accomplishing your goals.



# PHOCUSWIRE STUDIO

2021 marked the return of the PhocusWire Studio in the Exhibitor Showcase. With prime real estate within the conference, the PhocusWire editorial team conducted over 40 interviews with the most innovative companies and leaders, digging deep into the stories, profiles and strategies that will make the industry smarter, bolder and better in 2022.

The PhocusWire team even flexed their journalistic interview skills on Center Stage, moderating Executive Interviews and Roundtables with their unique skills and style.





The  
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Conference

November 14-17, 2022  
JW Marriott, Phoenix  
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2022

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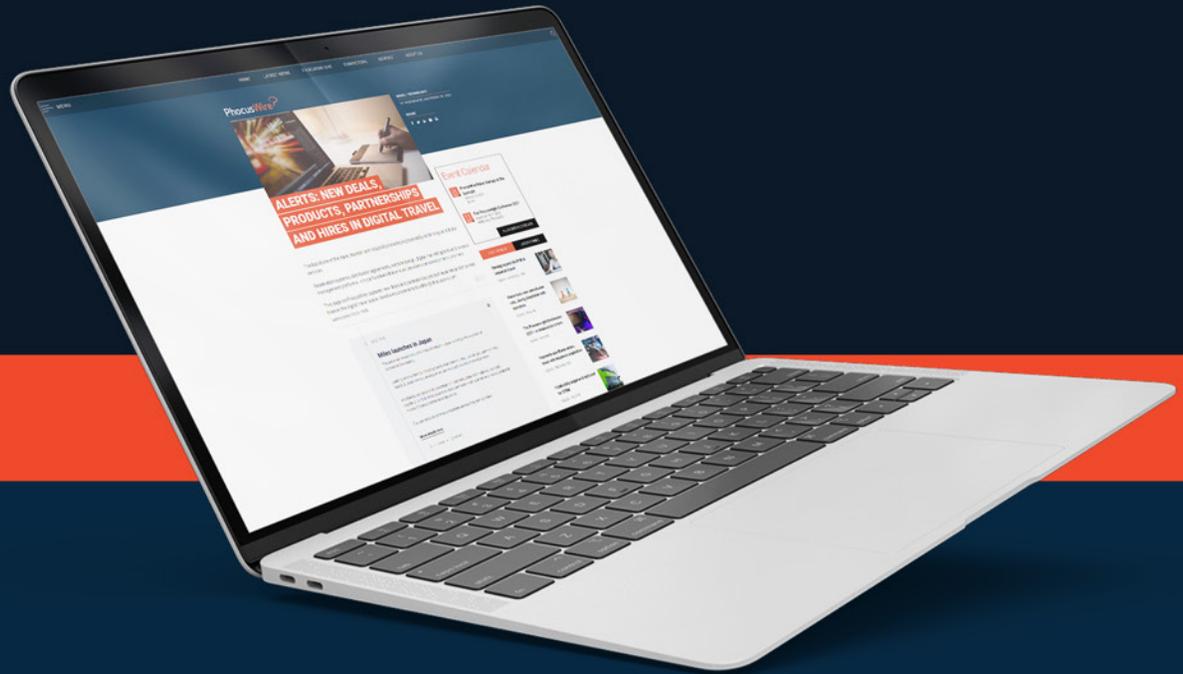
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# PhocusWire<sup>?</sup>



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**WiT**

TravelTechLeaders

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GREAT  
DECISIONS.**