



# The Phocuswright Conference



# I, TRAVELER

## EMBRACING POST MOBILE



## CONFERENCE WRAP UP



NOVEMBER 16 - 19, 2015  
FT. LAUDERDALE/HOLLYWOOD,  
FLORIDA USA



CONFERENCE

# OVERVIEW

**Each year, *The Phocuswright Conference* theme embodies the major trends shaping travel, presents a mandate that transcends buzz, and challenges industry leaders to rise to the occasion.**

Over 1,700 of the travel industry's most influential leaders from around the world attended the 2015 *Phocuswright Conference* in Hollywood, Florida. The most visionary thinkers and innovators with the "Next Big Idea" poured into the conference to learn, connect and innovate.

*The Phocuswright Conference* consisted of four days of activities and sessions,

including *The Battleground* (new for 2015), *The Travel Innovation Summit*, *Center Stage*, workshops, and the exhibitor and innovator showcase.

The theme for the 2015 *Phocuswright Conference* - I, Traveler: Embracing Post Mobile – welcomed a bold new era in which platforms are secondary, and travelers are primary.

We've taken carefully selected conference tidbits and gathered them in one place for you to enjoy.

To learn more about *The Phocuswright Conference* visit [phocuswrightconference.com](http://phocuswrightconference.com)

## THEME

While the travel industry debates what's next, travelers have already moved on. With years of mobile know-how under their belts, consumers are more concerned with what they are trying to do than which screen they use to do it. For the constantly connected, devices are simply a means to an end.

Mobile is no longer a discrete channel, technology or platform. It's become the ground we walk upon, the air we breathe.

With nearly nine in 10 owning a smartphone and one in two owning at least three devices (phone + tablet + PC), travelers are past asking "desktop or mobile?" Are you?

The urgency of a mobile strategy has long since passed. Today, mobile first is obvious, but customer first is a must.

# JOIN US IN 2016

**NOVEMBER 15-17  
LOS ANGELES, CALIFORNIA, US**

**WWW.PHOCUSWRIGHTCONFERENCE.COM**

## THE TRAVEL INNOVATION SUMMIT

## BATTLEGROUND

This year, Phocuswright created a new program providing early-stage companies – that do not have the funds to invest in *The Travel Innovation Summit* – access to a game-changing opportunity.

*The Battleground* is a unique preliminary *Travel Innovation Summit* round. During *The Battleground*, 21 applicants had six minutes each to demonstrate their

innovations to a panel of ruthless and uncensored judges, and the cheers or jeers of a live audience. In the end, and after an unbreakable tie, four companies won the right to move on to *The Travel Innovation Summit*, where they demonstrated on the main stage in front of the most discerning audience in travel.



### BATTLEGROUND COMPETITORS

- BELLHOP
- BUCKET
- GRAB
- GUIDEKICK
- HITLIST
- HOTELIED
- LOKAFY
- MAGPIE
- PANA
- PROCERUS
- SHARETHEBUS
- TRAVELWITS
- TREKKABLE \*
- TRIPBAM \*
- TRYTN
- VISIT.ORG
- VOOPTER
- WAYGO \*
- WETRAVEL
- WYNDOW
- ZIZOO \*

\*WINNER

## THE TRAVEL

# INNOVATION SUMMIT

The Travel Innovation Summit, presented by Brand USA – DiscoverAmerica.com, is THE launch pad for the travel, tourism and hospitality industry's most impactful innovations. Since its inception in 2008, *The Travel Innovation Summit* has attracted a broad range of startups from diverse geographic regions and this year was no different.

Attendees came prepared to see leading-edge technology and ideas demonstrated by travel startup, emerging or established

companies with an exceptional technology innovation. A total of 43 companies demonstrated their innovations over two days and were judged by a panel of 16 Dragons. The atmosphere was electric and stakes were high as candidates from around the world demonstrated their creations before a savvy audience of travel executives, media and investors.



## THE TRAVEL INNOVATION SUMMIT

# AWARD WINNERS

### THE GENERAL CATALYST AWARD FOR TRAVEL INNOVATION

AND

### THE MOST INNOVATIVE EMERGING COMPANY

**WINNER: TANSLER INC.**

Tansler (an anagram of “rentals”) is a vacation rental marketplace that allows renters to name their price, choose multiple homes and submit one binding offer. Hosts compete for the booking through a 24-hour “reverse auction” and the first host to accept the offer ends the auction and confirms the reservation. Tansler eliminates the back-and-forth between renters and hosts making the rental process simpler, faster and more transparent.

### THE BRAND USA AWARD FOR TRAVEL MARKETING INNOVATION

**WINNER: TRAVEFY**

Travefy is a travel planning platform with tools to collaborate on trip details, build rich itineraries, and collect shared expenses. Travefy is available directly to consumers and branded Pro versions are available for travel brands, suppliers and agents among others. Travefy's Pro tools help suppliers, OTAs, TMCs and others increase customer engagement and sales with sticky planning tools and open new sources of revenue.

### 33ENTREPRENEURS BEST TEAM AWARD

**WINNER: TREKKABLE**

Securing a room that fits the needs of people who face mobility challenges should not cost extra time, effort or expense. Trekkable exists to change this situation by capturing ratings of specific properties through the lens of accessibility. Trekkable truly enables anyone with mobility concerns to know what kind of experience they can expect up front.

### PEOPLE'S CHOICE AWARD

**WINNER: TRIPCHAMP**

An open platform for all types of sellers of air and hotel content to reach corporate travelers, TMCs, leisure agents, white label and OEMs. The company provides a different user experience and better pricing than the OTAs.

### THE MOST INNOVATIVE STARTUP COMPANY

**WINNER: PROXCE**

“Proximity Identity Manager” uses Bluetooth Smart (iBeacons/Eddystone) and Geofence to identify guests in real time and allows auto check-in and keyless entry to guest rooms at hotels. The system allows the smartphone to be aware of its surroundings and provides more personalized, non-intrusive, contextual content. The system is built to be scalable to different verticals like airports, restaurants, etc. to offer value-added services.

### THE MOST INNOVATIVE ESTABLISHED COMPANY

**WINNER: REVINATE**

Revinate helps hotels deliver personalized experiences that create valuable relationships and lifelong customers. Unite disparate guest data sources in a single Revinate Rich Guest Profile and pair it with an advanced marketing automation platform, to develop targeted offers for a VIP, wine lover, or golfer. Hoteliers can surprise guests by extending special offers and providing them access to staff 24/7 via a mobile application and centralized request center.



WEDNESDAY, NOVEMBER 18

# CENTER STAGE

Technology innovation and breakthrough business models are forging new markets, fueling sudden successes and turning long-held beliefs into liabilities. *The Phocuswright Conference* assembled the industry's best, biggest and brightest to share their vision and explore I, Traveler ... which welcomed a bold new era in which platforms are secondary, and travelers are primary.

*The Phocuswright Conference* is a live research project where attendees immerse themselves, real time, in an environment that impels them not to think outside the box, but to break the box entirely – and to use its best parts to create something new and extraordinary.

View all sessions in their entirety at  
[phocuswrightconference.com/streaming](http://phocuswrightconference.com/streaming)

## SPEAKERS

**Stephen Kaufer, President and CEO, TripAdvisor**

**Steve Hafner, Co-Founder and CEO, KAYAK**

**Gareth Williams, Co-Founder and CEO, Skyscanner Ltd.**

**Hugo Burge, CEO, Momondo Group**

**Adam Goldstein, CEO, Hipmunk**

**Brian Sharples, Co-Founder and CEO, HomeAway.com Inc.**

**Gail Mandel, President and CEO, Wyndham Exchange & Rentals**

**Greg Marsh, Co-Founder and CEO, onefinestay**

**Josh Wyatt, Chief Strategic Officer, Generator Hostels and Partner & Senior Advisor, Patron Capital Advisers LLP**

**Gregory O'Hara, Chairman and CEO, Certares and Chairman of the Board, American Express Global Business Travel**

**Sebastien Bazin, Chairman and CEO, AccorHotels**

**Dara Khosrowshahi, President and CEO, Expedia Inc.**

"As an industry we are at a turning point, where we can no longer deliver the services the way we are accustomed to – we must deliver them the way our customers want."

- Douglas Quinby,  
Vice President, Research,  
*Phocuswright, Inc.*

**EXECUTIVE INTERVIEW: IT'S A TRIP**

# STEPHEN KAUFER

One-on-one with the CEO and founder of one of travel's most influential - and disruptive - companies.

**On steering through big changes:**

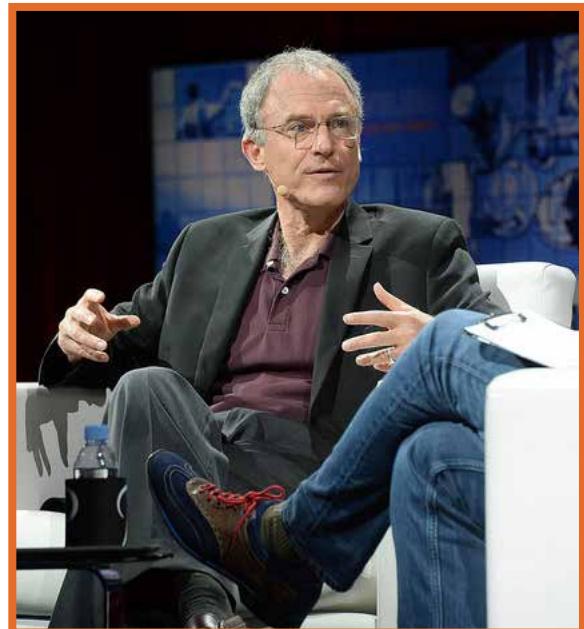
"It certainly is a challenge, no doubt about it, but I'd like to think I set the seeds for, you could call it constant change. When we first were part of Expedia and then when we spun out independently, I got to talk to our new board, I got to talk to investors, and - most importantly - I got to talk to all the employees of the company about building a company for the long term. And I know that sounds really cliché but if you can build it into the culture from day one ... and say look - it's a really fast moving industry, we are never going to be left behind. We might make some wrong turns here and there, but where we're going is going to require change so bear with me ... and yes, we had a few more changes than we thought, but I'd like to think it's because we set the culture."

**On the introduction of instant booking in partnership with the Priceline Group:**

"The art of the compromise is a wonderful way to conduct business ... there's some give, there's some take and I think where we ended up was really good. And maybe we all should have started there, but sometimes it takes a little while to get there. It's live to a portion of our traffic now. We like the way it feels to our travelers and from what we can tell it looks good."

**On the future:**

"We want to be a facilitator, we want someone to be able to consider a product, decide whether it's right or not and be able to complete a booking on TripAdvisor if they want to."



Stephen Kaufer, President and CEO, TripAdvisor

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**EXECUTIVE INTERVIEW: HOMEAWAY**

# BRIAN SHARPLES

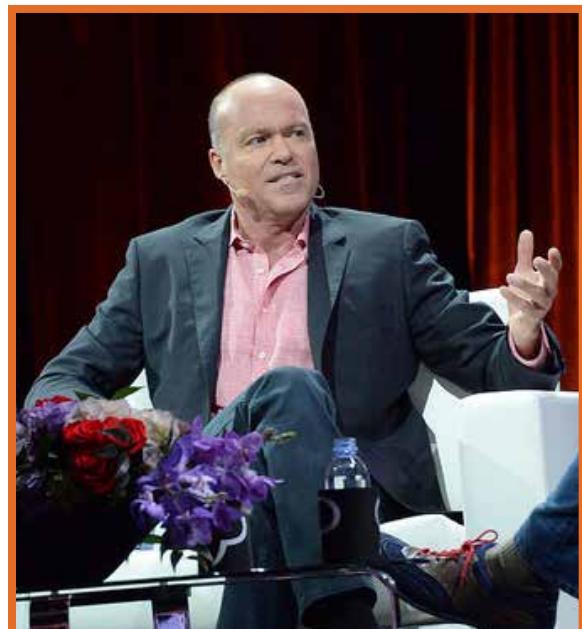
Ten years since its founding and a million listings later, the co-founder and CEO discussed what's next for the world's largest vacation rental site.

**On partnership with Expedia:**

"One of the things that was very impressive to us when we first got into a partnership with Expedia was just watching their culture of 'test and learn.' So what you've seen with Expedia over the two years, I think, is number one, a ton of patience and a lot of rigorous testing trying to understand things like cannibalization between vacation rentals and hotels and where best places to put them ... Expedia hasn't done a full implementation of HomeAway properties on the site, obviously now that they have acquired the company they saw some things that they liked ... But the fact is that when you are splitting economics, it's tougher for them to expose our inventory across their portfolio. When you own 100% of the economics, that changes pretty drastically. One of the nice things about this acquisition is that there are things that are possibly left unknown, but they've spent years playing with our product and I think (they) know exactly what they are getting into."

**Why join with Expedia now?**

"We operate in a competitive environment getting more competitive all the time, we have pure play competitors like Airbnb, we've got Booking.com in this space, (TripAdvisor) has been in this space for a number of years. It's a business that is going through quite a bit of change. When we were first here at Phocuswright I remember telling you that it felt almost a little odd to be here because we didn't feel like a travel company so much at the time, we were a marketplace. We felt like we were more like eBay ... fast forward ten years and we are running very hard and fast to make the booking experience look as much like the hotel booking experience as we can."



Brian Sharples, Co-Founder and CEO,  
HomeAway.com Inc.

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**KEYNOTE: HOSPITALITY ACCORDING TO ...**

# SEBASTIEN BAZIN

The CEO of one of the world's largest hotel companies charted his course amid the brave new world of hospitality.

"I have to battle against very agile companies. Is it possible? Yeah. Is it difficult? Of course it is. So, what I said was I am going to start with making five priorities at Accor."

First: Improve operations. "I have to get my act together on improving my operations and one way to do it was to simplify the decision making process."

Second: Digital. "My modus operandi is very simple. I believe that my job is to find, in the next five years, a new line of service, a new product, a new offer. Which is likely to be bigger than what Accor does today."

Third: Pipeline development. "All of our company is developing fast but without enough discipline. We operate in 95 countries. Half of those countries make 100% of my profit. We have to be much more selective on which brand, which country, and forget about countries because it's stupid ... now we have to talk about cities. Only cities matter. Not countries anymore."

Fourth: Food and beverage. "It is very bizarre how hoteliers only talk about beds in hotels when half of the comments on TripAdvisor are related to catering and food and beverage and no one cares about it ... The mobile phone is changing everything when it comes to F&B ... 85% of the people in your hotel on any mobile application they are looking at where they can have dinner outside of the hotel. They are not going to be staying with you for dinner because they don't want to because they have a choice."



Sébastien Bazin, Chairman and CEO,  
AccorHotels

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Fifth: Management culture. "I need to change the management culture ... 90% of the decisions being made at Accor are made by people like me. Over 50 years old. It won't work. Because those under the age of 35 have a much better view on what the market needs ... They can predict new services and offers in a much better way than I can do it. And I don't give them any autonomy and I don't give them any decision-making power. It is something that needs to be unshuffled. Needs to be restructured."

## EXECUTIVE INTERVIEW: ONE-ON-ONE WITH EXPEDIA

# DARA KHOSROSHAHI

The leader of the world's largest online travel agency talked of acquisitions, competition and staying on top in a rapidly changing global - and increasingly mobile - travel marketplace.

### What made you decide it was time to take out Travelocity and Orbitz?

"I think that it was an opportunity that we found in having invested in and building up this technology back-end and technology platform for the brand Expedia. You know we had a problem as company five or six years ago where we were a technology company with crappy technology. We had to really reinvest in our tech. I think the amount that we've spent on technology now is \$750 million. It's quadruple where it was four or five years ago. We built this terrific platform, hired incredibly talented engineers and product folk, and we thought we built a platform in a way in which we could take multiple brands and put them essentially on top of that platform with some customization, branding, etc ... So that the customer gets a different experience ... You don't need to have all of these different platforms and spend double or triple on technology. It was an opportunistic acquisition. One of them worked. So we thought, well, if that one worked maybe another one can work as well."

"We are at the beginning with Orbitz. We've enclosed Orbitz fairly recently. We have made the decisions to make Orbitz.com and CheapTickets onto the brand Expedia platform although the experience will be different ... Orbitz had built a terrific business in powering sites like American Express Travel on the leisure side. That's a piece of the business, that based on what we've seen from Orbitz, is super interesting, has terrific technology and a really good team. That's an area where we are going to lead into and hopefully build on what Orbitz did."



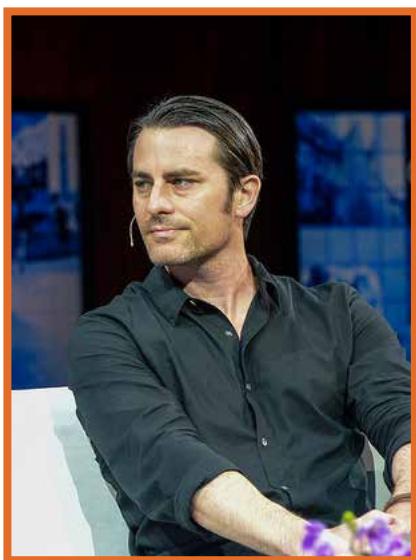
Dara Khosrowshahi, President and CEO, Expedia Inc.

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"Travelocity was a bit of a lift and shift. Orbitz is more the two companies coming together and picking the best and picking the best of breed and there are definitely parts where Orbitz was best of breed ... I don't think we will maintain the brand, but you can bet that we will maintain that technology team and they will really add to our platforms going forward."

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THURSDAY, NOVEMBER 19

# CENTER STAGE

"Where are these next breakthroughs going to come from? Maybe from some of the companies we saw present over the last two days at *The Travel Innovation Summit*. Maybe from some unknown developer without a lick of industry experience, maybe from someone in this very room. Honestly I don't know. But I do know that we are at the onset of an extraordinary period in travel, where the possibilities of mobile, messaging, big analytics and so much more are just beginning to be explored."

- Douglas Quinby, Vice President, Research, Phocuswright Inc.

## SPEAKERS

Michael Olson, Managing Director and Senior Research Analyst, Piper Jaffray & Co.

Eric Sheridan, MD, UBS

Alicia Yap, Managing Director, Head of Asia-ex Japan Internet Research, Barclays PLC

Oliver Heckmann, VP, Travel and Shopping, Google

Rod Cuthbert, CEO, Rome2Rio

Elizabeth Harz, President, Media, ADARA

Greg Stubblefield, Chief Strategy Officer and Executive Vice President, Global Sales & Marketing, Enterprise Holdings

Bobby Healy, CTO, CarTrawler

Jens Wohltorf, Co-Founder and CEO, Blacklane

Luciano Barreto, CEO, Submarino Viagens

Juan Pablo Lafosse, CEO, Almundo

Paulo Nascimento, Ceo, ViajaNet

Chip Conley, Head of Global Hospitality and Strategy, Airbnb

Nicolas Brusson, Co-Founder and COO, BlaBlaCar Talkbacker

Guy Michlin, CEO & Co-founder, EatWith.com

Jenny Wu, Chief Strategy Officer, Ctrip.com International, Ltd.

Sherri Wu, Chief Strategy Officer, Alitrip (Alibaba Group)

Ashish Kashyap, Group CEO, ibibo Group

Takanobu Yamamoto, Executive Officer, Travel Business, Rakuten Inc.

Tim Mapes, Senior Vice President, Marketing, Delta Air Lines Inc.

Peter Greenberg, CBS News Travel Editor, CBS Broadcasting, Inc.

Dana Dunne, CEO, eDreams ODIGEO

Scott Gutz, President and CEO, Amadeus North America

Werner Kunz, Chief Operating Officer, Fareportal

Darren Huston, President & CEO, The Priceline Group and CEO, Booking.com

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**KEYNOTE: MICRO-MOMENTS**

# OLIVER HECKMANN

This search giant's new vice president of travel spoke on the continued consumer shift to mobile and how Google is thinking about the new moments that matter.

"We did a research study with a third-party research agency and an opted-in panel of users who shared their complete Internet behavior with us. In the two months of that study, we observed almost 40,000 'digital moments' like searching, people looking at websites, consuming online video or using apps. What's remarkable is that 87% of those digital moments were actually happening on a mobile device."

**Zoomed in view of one user - "Amy":**

"What's interesting for us here in this room is looking at her travel behavior. Amy was actually researching a trip to Disney World. What's very remarkable here is that this is very clearly a high consideration activity for her. She had actually started researching this trip before the study began and in two months of study, there were 490 digital moments of her trying to plan this trip, and she was not finished by the time study ended two months later. The behavior we see with Amy is generally what we see throughout the whole Internet."

"In October, Google's mobile search traffic across everything globally has surpassed the amount of search traffic that we are seeing on desktop. If we zoom in and look only at the travel-specific queries on Google, we see a similar pattern that's still continuing to grow massively fast on mobile with a 50% increase in mobile searches in travel year-over-year ... At the same time as the number of sessions increase, they actually become shorter and shorter. That's why we call them moments. Users are willing to convert on mobile. We've seen an almost doubling of mobile conversion rates in the travel space in the last year."



Oliver Heckmann, VP, Travel and Shopping,  
Google

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**KEYNOTE: CAR WARS**

# GREG STUBBLEFIELD

The head of strategy for the world's largest car rental company took us for a spin through the rapid changes ahead for rentals, rides and more.

"I think the key takeaway that we have is that yes, there are more transportation solutions available than ever before. More people have access to these solutions and the transportation market is evolving and growing across the board. The key, whether you're an incumbent or new entrant, is using technologies to deliver transportation solutions the way consumers want to access them."

**Why haven't you attacked competitors like Uber?**

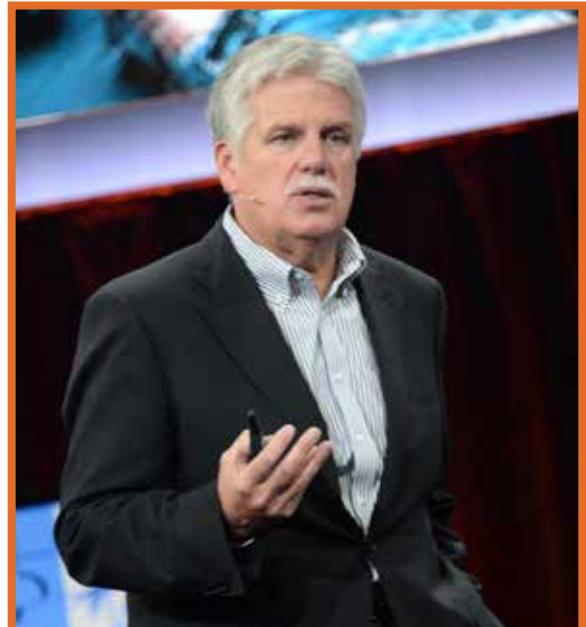
"The single biggest reason is because I think it's still early days in the industry, if you will. The livery business is not, but the on-demand is new days and there are still a lot of regulatory issues ... around the world ... obviously we have the infrastructure. We have the vehicles."

**On self-driving cars:**

"Self-driving or the autonomous vehicle will be there at some point in time and it's a little too far down the road map today to think about how that will impact overall. It will, in some confined areas, but it's more of a long term and we'll look at it more in the next three to five years."

**How are you going to execute in China?**

"We have a great management team (in China) ... it's kind of the Wild Wild West in terms of the development of it. There are inherent challenges in the tier one cities, like getting access to license plates to grow your fleet but our fleet is going terrific. We're up about 75% year-over-year with 1,250 delivery points in about 100 cities, so we feel great about where it's going."



Greg Stubblefield, Chief Strategy Officer  
and Executive Vice President, Global Sales &  
Marketing, Enterprise Holdings  
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## EXECUTIVE INTERVIEW: DELVING INTO DELTA **TIM MAPES**

A seat is a seat is not a seat. The head of marketing for one of the world's largest airlines discussed the new rules of sales, marketing, merchandising and distribution for air travel.

"I think the biggest thing that we focus on, with the customer at the center of everything we do, is a continued evolution from what was at one point almost a one size fits all model. You might have had first class or economy, or business class and first class internationally, to acknowledgement that within the data there are many, many more distinct segments. And it's not about just premium economy or discounted coach. It's a range of behavioral and demographically driven market segments that in the past might have been business or leisure, but that today have value up and down. The value streams of whether it's the type of productivity you can do on a plane, or the type of enjoyment, or any range of variables that we can deliver and how do we provide experiences, products and the distribution of those products of those types of segments."

### **On distribution:**

"I think the same way Tom Ford doesn't sell his suits through every distribution channel, Delta has no intention of sharing and distributing our content in places we don't think are brand accretive. So, having invested \$8 billion into the product, whether it's flatbeds or Wi-Fi or lounges or any other things. I think a lot of the distribution landscape needs to continue to evolve to ensure that you are able to merchandise what is a product. A seat is not a seat when one goes flat, one kind of goes angled flat, one doesn't recline or what have you ... most distribution today still doesn't fully merchandise and demonstrate (options)"



Tim Mapes, Senior Vice President, Marketing,  
Delta Air Lines Inc.  
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## EXECUTIVE INTERVIEW: THE PRICELINE GROUP AND BOOKING.COM

# DARREN HUSTON

The Priceline Group's president and CEO took on mobile, emerging markets, vacation rentals, consolidation, regulation ... and pretty much everything under the sun in online travel.

### On Starwood and Marriott merger:

"There is one thing that is needed in the hotel industry and that is continued diversity. And as long as the W can maintain being the W and the Marriott can be the Marriott and they manage that portfolio to continue to give customers diverse experiences, then it should be a really good thing and I certainly welcome it."

### On working with hotels:

"Our interests are very aligned with people who own hotels. We're the least expensive way for them to generate new demand. Our customers are generally very transient. The customers that are coming back to the same hotel over, and over, and over again and who are doing the miles and all of that is a different customer base. We're marketing in 42 languages around the world. Nobody has to work with us, but it seems to work and I'm proud of what we do, so I continue to focus on what we can control and I feel good. Our relationship and our business with all the major chains is growing very fast and I think that also reflects the nature of the opening up of the hotel industry."

### On Expedia's acquisition of HomeAway:

"When I first arrived at Booking.com, we were a hotel booking company and that is still our primary business. In the last four years, we've been building out an alternative accommodation portfolio and as we are doing that, we just get further and further down what I call the 'hotel pyramid' and you eventually end up in vacation rental land like single homeowners ... Three years ago I might have needed more help, but we've



Darren Huston, President & CEO, The Priceline Group and CEO, Booking.com  
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continued along the path of building out this fee-free frictionless booking experience that makes booking a vacation rental like booking a hotel room. There's some that may believe that we'll never get to the end of that. That the last home in the world will not want to be booked that way. I believe differently. I believe that is where the puck is moving and that's what we are working toward and ... I've built that business with 20 people. If it's worth \$4 billion they should all get a big bonus this year for the work that has been done because we have now 6.6 million rooms in the alternative accommodations space. That's three times more than any of our nearest competitors and we're adding 1,000 properties a day."

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