

A nighttime photograph of a canal in Amsterdam, likely the Herengracht. The water is dark, reflecting the warm yellow lights from the buildings and street lamps along the canal. Several boats are moored along the left bank, including a white boat with a blue cover and a white boat with a red stripe. The buildings are multi-story with many windows, some of which are lit up. A prominent clock tower is visible in the background. The sky is a deep blue, suggesting dusk or early evening. The entire image is framed by a thick, bright pink border.

# New. Power. Distribution.

Phocuswright Europe 2017  
16 - 18 May 2017

Conference Wrap Up

[phocuswrighteurope.com](http://phocuswrighteurope.com)

## CONFERENCE

# OVERVIEW

The sister event of Phocuswright's two-decade-running U.S. conference, Phocuswright Europe drew the region's top players around our rigorous and unbiased research to discuss the trends, technology and turmoil affecting the European travel market.

The fourth edition of Phocuswright Europe was held in the historic Beurs van Berlage venue in the heart of Amsterdam, The Netherlands.

The event gathered hospitality, travel and tourism's most innovative thinkers and leaders together to connect, share and move the industry forward.

"A record number of attendees joined us in Amsterdam seeking to confront the challenges our industry faces," said Phocuswright president, Simon Lehmann.

"We estimate the total European travel market to reach €310 Billion by 2020. That's an average growth rate of between three and four percent annually. The outlook for travel and tourism remains robust, despite economic fragilities and other sources of volatility in the wider market. We are proud to have gathered leaders of the European travel space to share their wisdom, ideas and know-how as the world we know is constantly changing," Lehmann added. "We have received tremendous feedback from our audience who left feeling inspired, refreshed and armed for the future."

Learn more about Phocuswright Europe at [www.phocuswrighteurope.com](http://www.phocuswrighteurope.com)

**See you in  
2018!**

15 - 17 May 2018  
Beurs van Berlage  
Amsterdam

## NEW. POWER. DISTRIBUTION.

... lays bare the issues confronting European travel, tourism and hospitality, and outlines a roadmap for success in 2017 and beyond.

**NEW.** After years of "Are we there yet?," chats, bots and messaging are finding their sweet spot in travel. Voice assistants and AI threaten to unseat type, swipe and call as the way to get things done. Clinging to the tried-and-true is a sure-fire ticket to travel's trash heap. Just being open to change won't cut it anymore; suppliers and intermediaries need to innovate and make it happen.

**POWER.** Europe's travel behemoths may be extremely well positioned, but don't kid yourself into capitulation ... or complacency. Major realignments are unfolding rapidly; Airbnb and Uber are no longer "alternative," Ryanair's got rooms, and legal rulings across the continent are taking away a bit of the big OTAs' edge. Meanwhile, tour operators and traditional agents -- still relevant and reliable in Europe -- are reinventing themselves to stay in the game.

**DISTRIBUTION.** With the search, shop, buy funnel stretched and twisted like never before, everyone's jostling to get closer to the transaction. Suppliers push direct bookings, mega OTAs continue to gobble up local competitors, and meta is muscling in on the money. What's next after Book on Google, and what will Facebook do to shake up the space in 2017? Make no mistake: Travelers will not be owned, and will book wherever they get the best deal, as long as it's fast, fun and personalized ... even (especially!) if it's on their phones.

# INNOVATION

Twelve innovators took the Phocuswright Europe stage to demonstrate groundbreaking applications and solutions that are set to change the travel industry.

“As the research we presented today shows, Europe is ahead of the curve in mobile and technology adoption,” said Phocuswright’s manager, research and innovation, Michael Coletta. “We were delighted to feature a diverse set of innovators from around the continent who are applying cutting-edge technologies and bringing new ways of thinking to tackle challenges across hospitality, tours, transportation and media. We look forward to seeing how they evolve and have a real impact on how we travel.”

The EMEA Travel Innovator of the Year winner and runner-up are chosen by the Dragons, a panel of judges comprised of travel and technology experts. Attendees of Phocuswright Europe determined the People’s Choice Award.

The EMEA Travel Innovator of the Year Award winner moves on to demonstrate at Summit, held during the U.S.-based Phocuswright Conference held Nov. 7 – 9 in Ft. Lauderdale/Hollywood, Florida.

The next startup Battleground will be held on September 12 in Sunnyvale, California.



**EMEA TRAVEL INNOVATOR OF THE YEAR**  
conichi

**RUNNER-UP**  
bookingkit GmbH

**PEOPLE’S CHOICE AWARDS**  
*An unprecedented tie for 2017*  
conichi  
Sharewood

**ABOUT THE COMPANIES**  
conichi provides seamless check-in, digital key and mobile payment solutions for hotels.

bookingkit GmbH is building a global GDS for tours and activities.

Sharewood is a P2P marketplace for listing and renting outdoor gear.

# CENTER STAGE

## SPEAKERS

Tobias Wann, CEO, @Leisure Group

Louise Daley, Deputy CEO, Asia Pacific, AccorHotels

Timothy Hughes, Vice President, Business Development, Agoda.com

Olivier Gremillon, Managing Director, EMEA, Airbnb

Blanca Menchaca, Co-Founder & COO, BeMyGuest Pte. Ltd.

Peter Verhoeven, Managing Director, Europe, Middle East, Africa, Booking.com

David O'Flanagan, CEO and Co-Founder, Boxever

LP Maurice, Co-Founder & CEO, Busbud

Bobby Healy, CTO, CarTrawler

Lennert De Jong, Chief Commercial Officer, citizenM Hotels

Shiwei Zhou, VP of Investments and Investor Relations, Ctrip.com International Ltd.

Amuda Goueli, CEO, Destinia

Christoph Klenner, Secretary General, European Technology & Travel Services Association (ETTSA)

Cyril Ranque, President of Lodging Partner Services, Expedia Inc.

Johan Svanstrom, President, Hotels.com and Expedia Affiliate Network, Expedia Inc.

Terry Kane, Head of Travel, Facebook Inc.

Guillaume de Marcillac, Co-CEO, FastBooking

Alex Shen, Strategic Partnership Manager, GetYourGuide

Tao Tao, Co-Founder and COO, GetYourGuide

Naren Shaam, Founder and CEO, GoEuro

Terri Scriven, Industry Head of Hospitality, Google

Joan Vilà, Executive Chairman, Hotelbeds

Jared Simon, COO & Co-Founder, HotelTonight

Mark Lomanno, Partner and Senior Advisor, Kalibri Labs

Thomas Heerkens, Managing Director, Landal GreenParks

Andrea Bertoli, Deputy CEO, lastminute.com group

Fabio Cannavale, Co-Founder and CEO, lastminute.com group

Paul English, CEO, Lola

Michael Simon, General Manager Distribution, EMEA & APAC, Marriott International

Henry Van Eeghen, Senior Director, Mercy Corps

Martin Symes, Owner, MS Consult

Joerg Trouvain, CEO, 7Travel, ProSieben Travel GmbH

Fritz Demopoulos, Founder, Queen's Road Capital

Rod Cuthbert, CEO, Rome2rio

Will Phillipson, Co-Founder and President, SilverRail Technologies

Choon Yang Quek, Chief Technology Officer, Singapore Tourism Board

Simon Breakwell, Venture Partner, Technology Crossover Ventures

Gilles Despas, Chief Marketing & Digital Officer, Thomas Cook Group plc

Min Yoon, CEO, TideSquare Co., Ltd

Johannes Thomas, Managing Director, trivago GmbH

Timothy O'Neil-Dunne, Co-Founder, Air Black Box, Managing Partner, VaultPAD Ventures

Kei Shibata, Co-Founder and CEO, Venture Republic Inc.

Michael Buller, Managing Director, Verband Internet Reisevertrieb

Alexandre Fontaine, Co-Founder and Executive Board Member, Voyage Privé

Polina Raygorodskaya, CEO, Wanderu

Salar Shahna, Creative Director and Co-Founder, World VR Forum

## DRAGONS

Sara Pavan, Investment Manager, Amadeus Ventures, Amadeus IT Group S.A.

Mat Orrego, CEO, Cornerstone Information Systems

Johannes Reck, CEO, GetYourGuide Inc.

Christian Saller, Partner, Holtzbrinck Ventures

Jochen Munding, Founder and Chairman, routeRANK Ltd.

Chris Hemmeter, Managing Director, Thayer Ventures

Kevin May, Senior Editor, Tnooz

Jo Hickson, Head of Innovation, TUI UK & Ireland



"However much time you are spending on recruiting, double it. The difference between creating a company worth \$10 million and a company worth \$1 billion is that the second one recruited harder."

Paul English, Lola



"A/B testing isn't something you do, it's a culture. Embrace chaos."

Peter Verhoeven  
Booking.com





@LobkeElbers:  
In the US 20% of  
searches are voice  
searches, based  
on information,  
not transactions  
according to  
@Google



@mercycorps\_uk:  
Mercy Corps'  
@henrivaneeghen talking  
at the #Phocuswright  
conference about our  
work in the global  
#refugeecrisis.



@alastairmck:  
Simon Breakwell,  
(ex-founder Expedia)  
says hotels face new  
gen of travelers who  
won't auto think of  
hotels in lodging  
choice.



Younger travelers, ages  
18-34, who have been  
native to smartphones  
and digital devices their  
entire lives are 1.5 times  
as likely to have travel  
apps than older travelers  
ages 55 and up.  
- Phocuswright



Not surprisingly, the youngest of travelers are most active with visual sharing. Travelers under 35 are four times as likely to use these platforms than travelers ages 35-54 and up to ten times as likely as travelers 55 and older.  
- Phocuswright



@fabiang:  
"If you think you're addicted to mobile, wait to go to a restaurant in Sanghai."  
@GetYOurGuide about mobile use in China



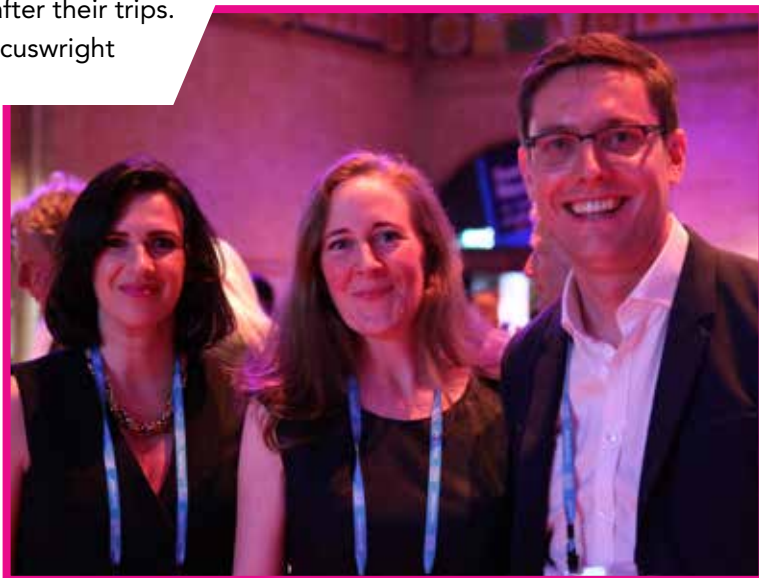




@Lottmus:  
Up next @Airbnb.  
@douglasquinby quick  
show of hands show  
80% of attendees at  
#phocuswright have  
used #airbnb



Social media is more of an all encompassing, 360-degree platform for the entire travel lifecycle. Social provides inspiration for travel. In many different forms consumers can find ads and travel deals on social. And then travelers use the very same platforms for sharing their experiences during and after their trips.  
- Phocuswright

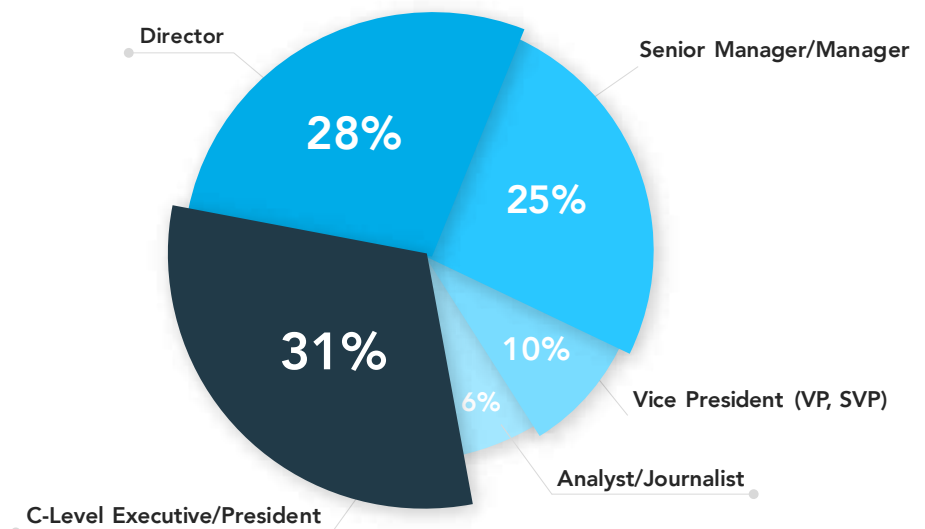


# 2017 ATTENDEE PROFILE

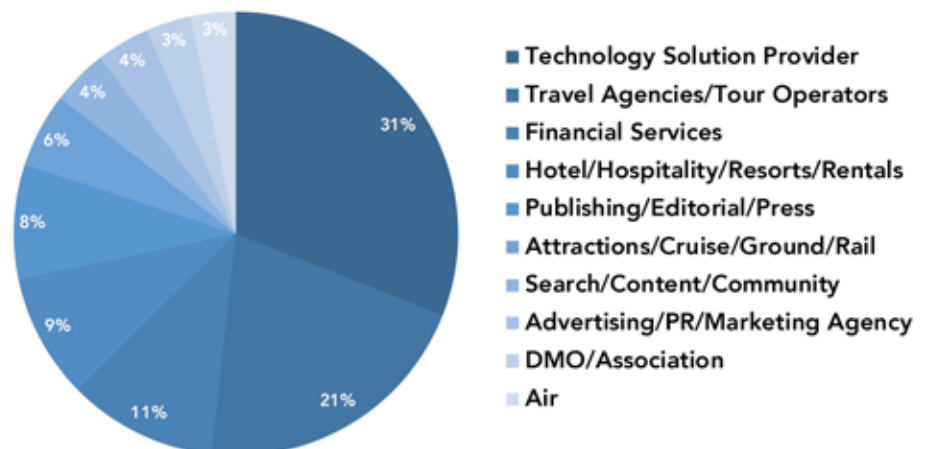
## ATTENDEES BY COUNTRY

Australia	Denmark	Ireland	Netherlands	Slovenia	United Arab Emirates
Austria	France	Israel	Pakistan	South Africa	United Kingdom
Belgium	Germany	Italy	Poland	Spain	United States
Canada	Greece	Japan	Portugal	Sweden	Uruguay
China	Hong Kong	Korea	Romania	Switzerland	Vietnam
Colombia	Iceland	Luxembourg	Russia	Thailand	
Czech Republic	India	Mexico	Singapore	Turkey	

## ATTENDEES BY TITLE



## ATTENDEES BY SEGMENT



# CLOSING POEM

Welcome to Booking's city.  
Priceline's cash cow.

But, 70% direct bookings?!  
Good luck looking!

Metasearch hipsters.  
Local OTAs.  
Series A ... Series B.

Relentless. Persistence.  
Chimney pots to flower pots.

Social disruption.  
Travel distribution.  
Personalization on the fly.  
Simon says.

Simon's surprise?  
Human behavior, mobile's massive  
rise.

Dreamy, jelly fish, flash mob.  
Destination activities?

Fragmented markets.  
Packages aren't niche!  
Chat bots, AI, voice unleash.

Copycat China? Copy kitties.  
Dubious logic, alternative facts.  
WeChat, Alibaba, mobile payment  
frontier.

China!  
Largest market full stop.

Paul's pivot.  
Kind CEO.

Technology tipping point.  
The new standard.

Offline. Online.  
Europe's time to shine.

Conichi conquers!  
See them,  
See you!  
Here next year.

Thank you  
to our  
partners!

CROSS-TINENTAL // SHR  
dcs plus  
Distil Networks  
Europ Assistance  
Expedia Media Solutions  
FWW Medien GmbH  
Hospitality Net  
iambassador  
IDA Ireland  
L'Echo Touristique  
Nexmo, The Vonage API  
Platform  
QYER Inc.  
RateGain  
Rentalcars Connect  
Riskified  
SDL  
Singapore Tourism Board  
SmartTravelNews  
Sound of C BVBA  
Switchfly

TecnoHotel  
Tnooz  
Translations.com  
Travel Appeal  
TravelMedia.ie  
Travel Weekly  
Travel Weekly Group  
TrekSoft  
USP Marketing & PR  
Voyazer/ZapMyTrip Travel  
Solutions LLP  
WNS Global Services  
Worldpay  
World Travel Market  
Wyndham Vacation Rentals