



COMMERCIAL STRATEGY CONFERENCE

Strategize, Optimize, Capitalize



26 July 2024

THE LEELA AMBIENCE GURUGRAM HOTEL, DELHI NCR, **INDIA**



Latest Hospitality Trends



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COMMERCIAL STRATEGY CONFERENCE

Strategize, Optimize, Capitalize

DELHI 26 July 2024

Global Travel

Overview deck



>
accenture

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Client Credentials

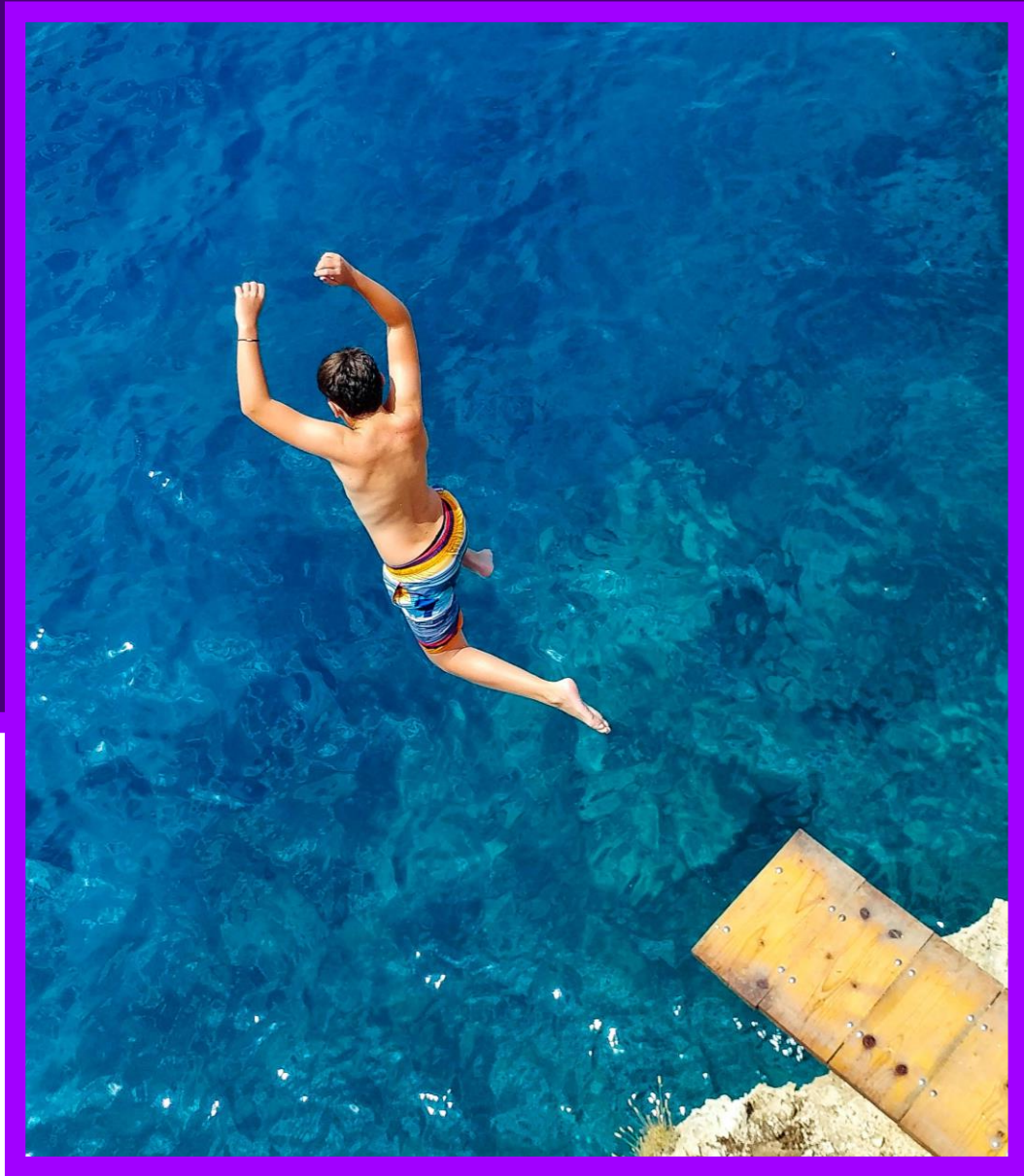


What are we seeing in the market

Constant change and relentless adaptation have characterized the travel industry up until now.

Future growth, post Covid, calls for bold action and a courageous mindset.





Travel Adaptation is the next adventure on travel's epic journey to growth. It's about evolving, taking stock, and adjusting operations to respond to the industry's rapidly changing landscape.

It's about being brave enough to **leave behind the old and opening your mind to the new** – a non-negotiable approach for **the hospitality industry** looking to take their organizations forward to find their new futures.

The next chapter. Welcome to a brave new world:



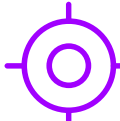
New traveler

Understanding shifting segments



Weight of the world

Learning to adapt to volatility



The readiness factor

Accessing critical capabilities

Top 12 Trends in the hospitality sector...



Empowering the workforce – training, flexibility, decision making



Rising Interest rates -impact on prop values & transactions



Culinary Experiences – authentic, diverse, senses driven



Green Hospitality – from sustainability to net positivity



Harnessing Power of Social Media – creating an authentic narrative



Bars & Drinks “redefining” creativity



Data Driven Enterprise (DDE) – analytics for optimum personalisation



Low profitability due to customer acquisition costs



Fine Dining – Reinventing to win



AI & Choosing the right Tech for the business – Apps, Contactless, Anywhere-anytime



Disruption by D2C/online platforms impacting customer loyalty



Fine Wine Prices – navigating the changing world

Evolving Demographics, Consumers & Market

Changes in Indian demographics

Population growth & shopper base

In 2023
India became the most populous country

900 mn
Internet Users

500 mn
Online shoppers by 2030

Age of population and longevity

50%+
Under 30 years

25%
Under 15 years

Life expectancy is steadily increasing but lags global levels

Growing per capita income

\$1,998
In 2017

➔

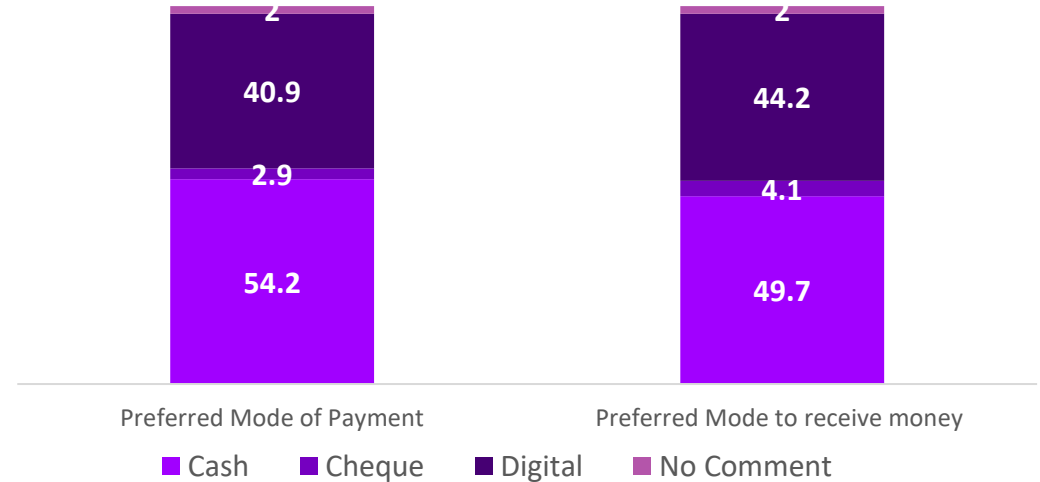
Approx \$2,500
In 2023-24

Changes in Household Structure

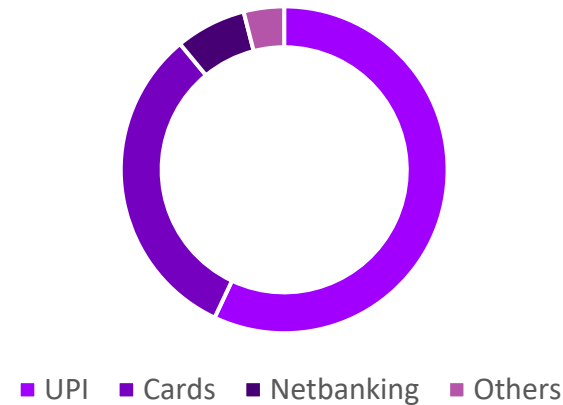
70%
Share of nuclear households

Nuclear households have increased by 13% over the past 2 decades and tend to spend 20-30% more than joint families

Payment methods and trends – Rise of UPI/Digital payments



Share of online payment modes



- UPI transactions saw a **650%** rise in semi-urban and rural stores in 2023
- On YoY basis, overall UPI transaction volumes were up **85%** and value up by **70%**



Travel & hospitality sector is poised for Growth but with many challenges facing them...



Rapidly evolving consumer behavior and demographics



High real estate costs, and empty offices..



Shortage of trained manpower



Rising digitization and dependence on platforms



Inflationary environment



Challenging transition to omni channel



Low profitability due to increasing marketing costs



Disruption by D2C/online brands impacting customer loyalty

Key Trends – Consumers in 2024 & beyond...

These Consumer trends will likely continue to impact the hospitality sector

1

Value for money mindset

- #1 Value polarization
- #2 Buying local
- #3 Inflationary pressures
- #4 Thoughtful indulgence
- #5 Widening choices
- #6 Maximum efficiency, minimum effort
- #7 Waste watching

2

Health in focus

- #8 Health hacks
- #9 Conscious food swaps
- #10 Prioritizing self –care
- #11 Guided health

3

Consumers in control

- #12 Repertoire shopping
- #13 Checking the label
- #14 DIY everything
- #15 Me time
- #16 Planned impulse



Rapidly evolving/changing consumer behavior

New Consumers and their changing aspirations



Rely on social media & online commerce channels for purchases



Willing to buy directly from brands, bypassing traditional channels



Increasingly value convenience / time compression and overall wellness



Mindset shift towards experiences over assets



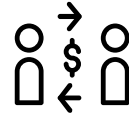
Increased expectations in terms of service quality

Inflationary environment

Global inflation and rising commodity prices in '22-23

4.7% Global inflation in 2021 → 6.8% In 2023

Primary causes include:



Global Trade disruption thru wars and "nation-first" mindset



Central Bank rate hikes



Exchange rate fluctuations



Post Covid, Ukraine & ME war

Impact on disposable income of consumers



Rising commodity prices



What does it imply?

Better sourcing and need for revisiting offerings mix to reflect shifts in consumer purchase behavior and margins



Low profits and margin pressures due to high costs of customer acquisition



Cost-to-serve optimization to improve EBITDA



Rising digitization and dependence on platforms

Key digitization trends in India

\$1.6 Tn

Consumer internet opportunity by 2030

1.3 Bn

Expected Internet Users by 2030

\$120 Bn

Projected e-commerce market size by 2026

E-commerce platforms leading the digitization wave

\$5.7 Bn

Festive period revenue of e-commerce platforms in India

75-80 Mn

No. of shoppers during peak festivals

27%

Growth registered by e-commerce firms in 2022-23 festive period

Emergence of Super Apps in India

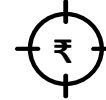


- Tata Neu had 2.2 mn app downloads and 2.1 mn app enrolments within a week of its launch
- Offers hotel & travel reservations, food orders, quick loans, Tata brands such as TataCliQ, Westside, Big Basket etc



- Reliance MyJio combines features of local search engine Just Dial, acquired by the firm
- Offers services such as JioMart, Jio UPI, Jio Music and more with over 500 mn downloads

Common challenges on the path to omnichannel



Lack of strategic alignment on long term vision and need for omnichannel within organizations



Inhibitions linked to adding online channels due to uncertainty on profitability



Consolidation of data from different channels to a unified data management system for sales and marketing initiatives



Lack of uniformity between customer service provided across various channels



Ensuring inventory availability and price uniformity across multiple commerce channels

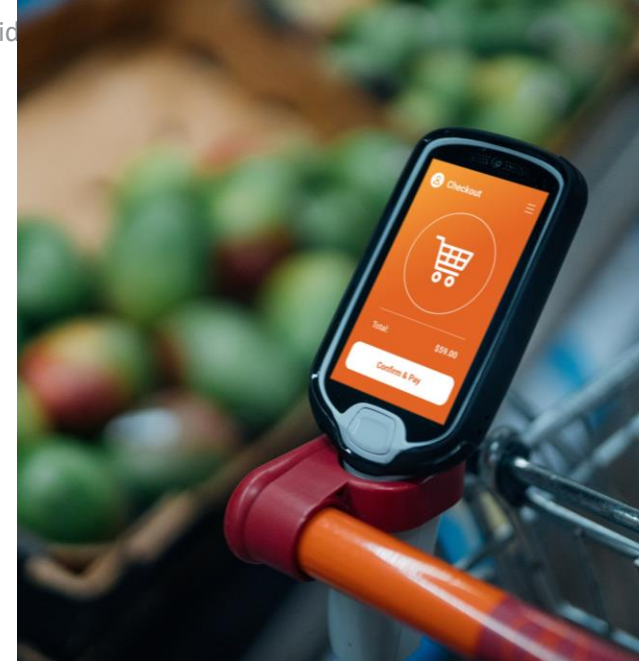
The Changing Consumer/Shopper ..

THE CONSUMER/ SHOPPER HAS CHANGED...

Since the pandemic...

Consumers have taken to digital in a big way, want to see more personalised approach from brands and enjoy a channel less experience. For the first time, sustainability is taking up consumer mind space

The Consumer has changed!



Consumers value the personal touch

- Would be delighted to have knowledgeable & friendly staff to provide help & advice
- Would be happy to receive personalized & relevant communication



Consumers are technology savvy

- 1/3rd use a variety of technologies while shopping
- 1/4th are willing to explore new technologies

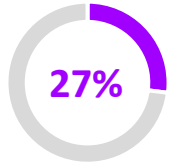
Consumers want a channel less shopping experience

- Choose & pay items in the store or online and have it delivered
- Seamlessly move from online to store or vice versa along the customer journey

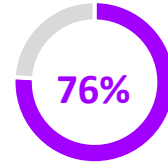
Consumers are switched on to Sustainability

- Extending product life
- Shopping from Responsible businesses

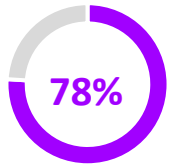
Consumers are tech savvy and brands have to move to “digitally engaging” with consumers



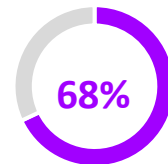
27% of online shoppers also buy through social commerce platforms in India



76% Indians prefer using UPI during checkouts when shopping online



78% Indians prefer to purchase clothing, shoes and accessories online, and 70% would shop groceries through social media apps



68% of Indians would like to explore shopping in the Metaverse



~50%

Increase in digital ad spending by retailers from 2019 to 2023



2.5x

Increase in online selling in last two years



~3x

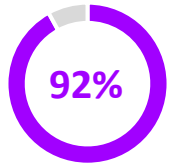
Increase in digital transactions



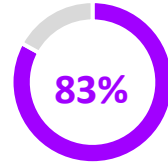
~11x

Growth in online purchases

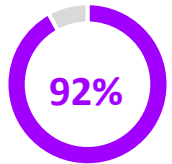
Consumers value the personal touch and brands need to provide customized solutions to them where possible



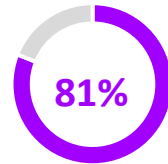
92% of shoppers recommended a brand/product to someone based on a good experience



83% of shoppers told their family and friends about a negative experience they had with a brand/product



92% of shoppers left a positive review about a good customer experience



81% of shoppers left a negative reviews about a bad customer experience

Three waves of better customer engagement



Wave 1: Know thy customer

Brands are just starting their digital journey, with a primary focus on understanding the customer. Most brands are still in this wave.



Wave 2: Begin to take action

Brands are starting to structure their data and insights engines to fuel personalized action.



Wave 3: Full personalization for each customer

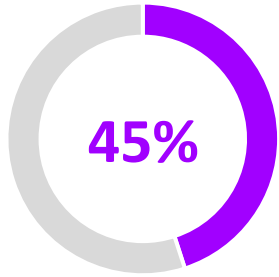
Brands deploy one-to-one personalized journeys in a seamless and automated way at scale, often running on cloud-based systems.

Sources:

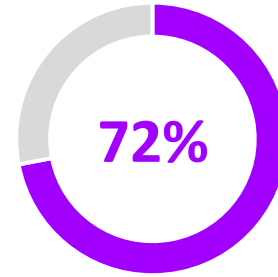
1. Criteo Shopper Story, India, January 2023. Survey respondents are consumers who use the internet at least once every month
2. <https://www.accenture.com/in-en/insights/retail/customer-engagement-strategy>



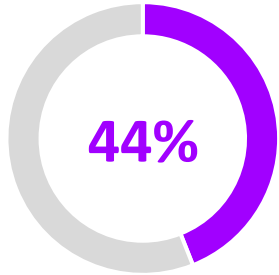
Consumers want a channel-less shopping experience but not all brands are delivering!



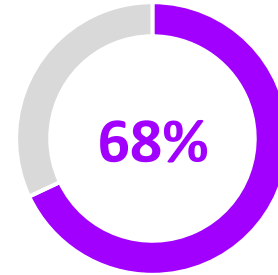
45% of shoppers browse products online but buy them at a store



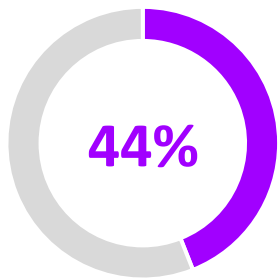
72% of respondents consider consistency of range of products available across physical and online stores as important



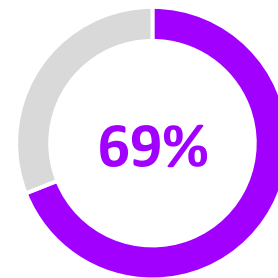
44% make purchases online after seeing the product at a retail store



68% respondents value consistency of offers and promotions between physical and online store fronts



44% order goods online and pick them up at a retail store

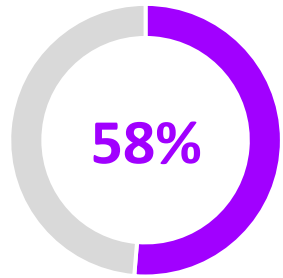


69% respondents also feel that customer service should be consistent between physical and online stores

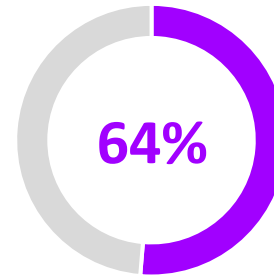
Source: Criteo Shopper Story, India, January 2023. Survey respondents are consumers who use the internet at least once every month



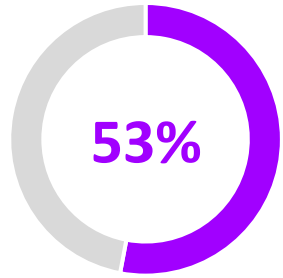
Consumers are looking for brands that have social and environmental purpose



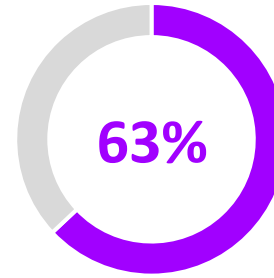
58% of consumers are prepared to invest time and money to support companies that do good



While shopping, 64% of consumers factor in sustainability at least occasionally



53% of consumers have stopped buying products/services that have a negative impact on the environment & society



63% of consumers feel it is up to businesses/producers to drive the cause

Increasing awareness and heightened consciousness have paved the way for more mindful living where consumers are seeking to coexist with nature and the environment

What keeps the travel C-suite up at night?



The 6 questions on the minds of the C-suite of hospitality companies

01

What new business models should I actively invest in and incorporate in the future?

02

How can I get demand back from leisure (B2C) and recover the corporate (B2B) segments?

03

How can I maximize the value and experience delivered to the "new traveler" segments?

04

How do I build a sustainable model and operate a more variable cost structure without inhibiting demand?

05

How can I accelerate new tech and digital capabilities to achieve my business outcomes?

06

How do I retain and attract the best talent?

Thank You

Appendix

**How can we help find
answers to the C-suite
questions?**

Industry-specific innovation

Accenture capabilities are applied through an industry lens to accelerate innovation



Hyperautomation

Automate and simplify back-office processes to create an agile, insight-rich organization using the latest technology. Reduce costs and streamline operational efficiencies with consistent, repeatable processes.



Retail in Travel

Drive customer loyalty and unlock the full value of travel retail to transform an airline/hospitality company into a modern travel brand.



B2B Travel

Capture new B2B and SMB customers with our proprietary platform designed for meetings & events (M&E) and B2B travelers that helps Travel companies identify new leads and increase revenue.



Back Office Excellence

Implement end-to-end business solutions built for the Aviation and Hospitality industries and driven by insights that empower our clients to create efficient, impactful cost savings in the back office.



Accenture Hospitality Management Solution

Develop a finance-as-a-service model fit for hospitality clients, powered by Oracle Cloud.



Cargo Solutions

Improve tracking and logistics systems with cargo solutions that provide traceability, ensure security, and minimize operational and administrative costs.



Aviation Intelligent Services

Provide clients fast, adaptable insights using our Aviation Intelligent Services Platform (AISP), a fully-supported data platform that helps clients create a better business.



Net New Revenue Platform

Open retail opportunities to travelers at every point in the journey, combining core products of the client with third-party retail offers and discounts.



Travel Sustainability

Transform travel companies into sustainable businesses with four strategic capabilities:

1. Net zero & strategy roadmap
2. SAF, DAC offsetting strategy
3. Carbon visibility & benchmarking
4. Sustainable traveler insights & communications



Intelligent Digital Sales for Leisure

Attract more customers, demand acquisition and conversion. Leverage audience modeling and propensity to buy-based campaigns, conversion rate optimization, personalized content and advanced guest/traveler profiling.

We focus on the areas that will help our clients get back to growth: industry-led, service-powered



Travel C-suite questions

What new business models should I actively invest in and incorporate in the future?

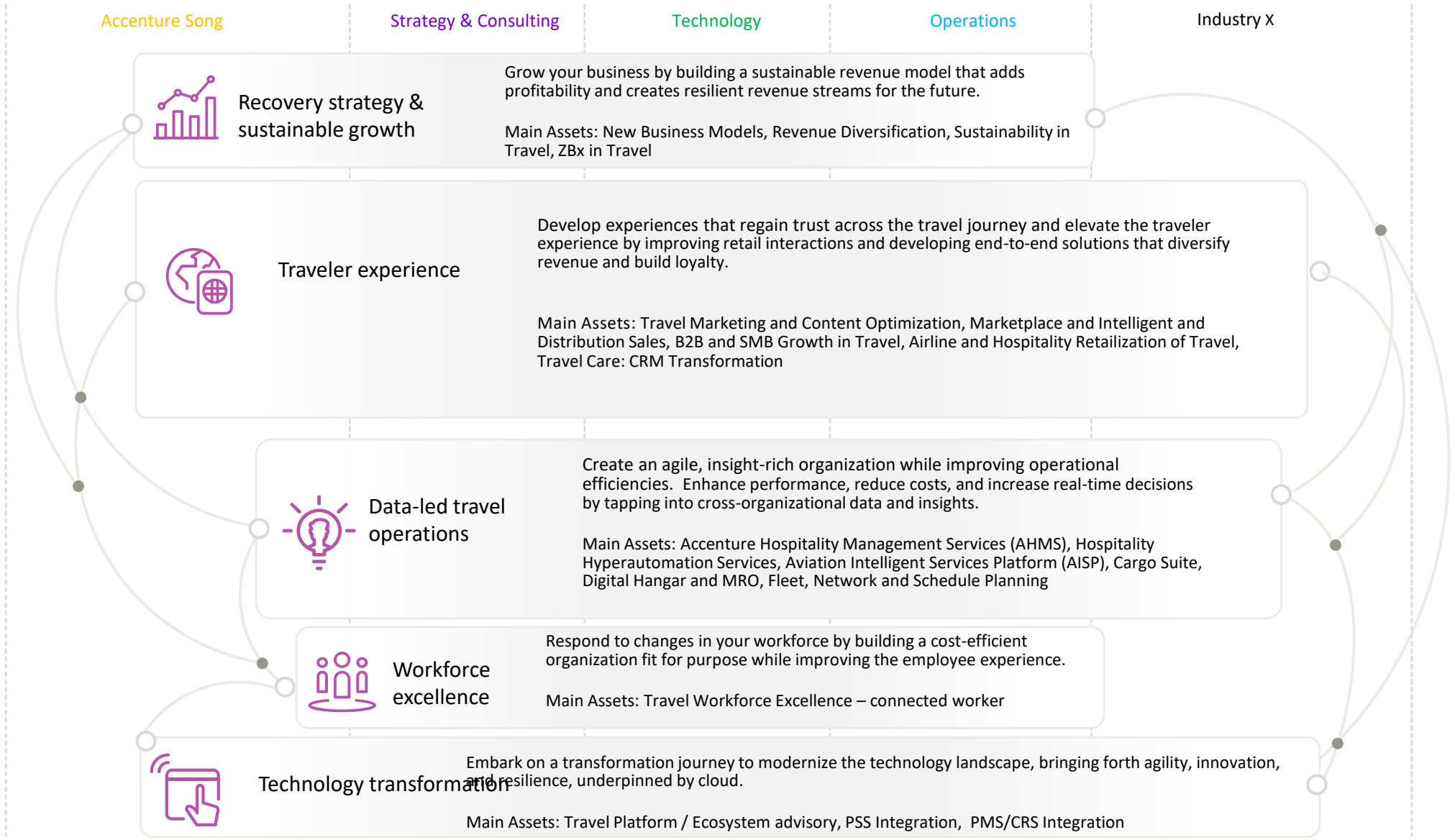
How can I maximize the value and experience delivered to the existing & "new traveler" segments?

How can I get the demand back from Leisure (B2C) and recover the Corporate (B2B) segments?

How do I build a sustainable model and operate a more variable cost structure without inhibiting demand?

How do I retain and attract the best talent?

How can I accelerate new tech and digital capability to achieve my business outcomes?



Travel Industry Themes

You can't control the forces shaping the travel industry, but you can increase your readiness factor for agility and resilience. Our experts work with the world's leading travel companies to build creative and pragmatic solutions for their business.

Traveler experience

Develop experiences that regain trust across the travel journey and elevate the traveler experience by improving retail interactions and developing end-to-end solutions that diversify revenue and build loyalty. [Learn more.](#)

Data-led travel operations

Enhance performance, reduce costs, and increase real-time decisions by tapping into cross-organizational travel data and insights. [Learn more.](#)

Technology transformation

Embark on a transformation journey to modernize the travel technology landscape, bringing forth agility, innovation, and resilience, underpinned by cloud. [Learn more.](#)

Recovery strategy & sustainable growth

Grow your travel business by building a sustainable revenue model that adds profitability and creates resilient revenue streams for the future. [Learn more.](#)

Workforce excellence

Respond to changes in your travel workforce by building a cost-efficient organization fit for purpose while improving the employee experience. [Learn more.](#)



Research & Thought Leadersh



Our research and insights create data-driven thought leadership



A selection of recent media coverage:

[Accenture and Changi Airport Group extend collaboration](#)

Spokespeople: Wee Wei Ng, Divyesh Vithlani | CIO Tech Asia | August 18, 2022

[Is Metaverse the future of travel?](#)

Spokesperson: Mike Tansey | MoneyFM | July 7, 2022

[Why It's Time to Extend Hospitality into the Metaverse](#)

Spokesperson: Emily Weiss | Hospitality Technology | July 6, 2022

[Accenture Looks to Reinvent Travel Loyalty for an Eco-Conscious World](#)

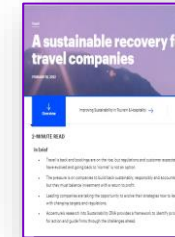
Spokesperson: Emily Weiss | SKIFT | February 7, 2022



NFT/NNRP

[The art of the possible for NFTs in travel](#)

July 2022



Sustainability

[A sustainable recovery for travel companies](#)

February 2022



Latest posts:

[Why data can make or break travel sustainability](#)

Tuba Guclu and Jesko Neuenburg | June 7, 2022

[How travel companies can boost revenue with cloud](#)

Jonathan Sullivan | May 13, 2022

[Using data to control costs and travel customer service](#)

Tuba Guclu | April 26, 2022

[Delivering responsible travel](#)

Jesko Neuenburg | January 20, 2022

[Understanding new traveler needs this holiday season](#)

Siji Elza George | January 5, 2022



#8: Data is hidden treasure

Guest speakers from Lufthansa and Accenture

#7: En route: Sustainability, transparency and trust

Guest speakers from Marriott International and World Travel & Tourism Council

#6 Soul searching: A creative and pragmatic approach

Guest speaker from Accenture Interactive

#5 Buying business travel? What corporates want

Guest speaker from Southwest Business



Cloud

[The Right Cloud Mandate in Travel](#)

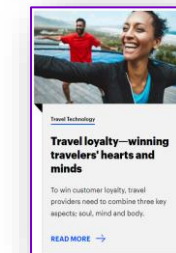
February 2022



Hospitality

[The year of the "new" traveler](#)

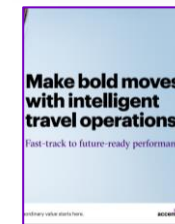
January 2022



Traveler Experience

[Travel loyalty—winning travelers' hearts and minds](#)

November 2021



Intelligent Operations

[Make bold moves with intelligent travel operations](#)

June 2021



Travel digital magazine

An online **subscription-based** magazine that inspires travel companies as they **get #backtogrowth**.



Dominate the Conversation

A highly editorial approach with relevant research, insights and stories

- ✓ Each issue explores a current industry inflection point
- ✓ Subscription-based
- ✓ Engaging client interviews
- ✓ Fresh ideas

SUBSCRIBE TODAY

Client Credentials



Our client testimonials

”



We value Accenture as a Premier Innovation Partner and look forward to continued collaboration to continuously enhance the platform based on both guest feedback and the tremendous amount of intelligence being generated.

John Padgett
Chief experience
and innovation officer,
Carnival Corporation's

”



With Accenture's help, direct sales increased 27 percent in the first year of implementation and are expected to grow on a 30 percent basis over the next three years.

José María Dalmau
Vice president of
global sales and marketing,
Meliá Hotels International

”



We look forward to continuing our collaboration with Accenture to improve efficiencies across the company and fuel our future growth plans.

Ken Greene
President,
Radisson Hotel Group, Americas

”



All the results (of our Finance Shared Services Center initiative) in terms of cost savings, all the efficiency levels... have been completed successfully and overachieved (by Accenture).

Francisco Morillo
Director of finance,
NH Hotels Group

Our client testimonials

”



Cathay Pacific is committed to benefiting customers through innovation and technology. We are pleased to partner with Accenture and we will continue to leverage its technology to develop more applications that our customers value.

Lawrence Fong

General Manager IT Solutions
Cathay Pacific

”



Accenture and Pega are helping us obtain deeper, real-time transparency to further streamline operations across our organization and offer a seamless, personalized experience. More efficient processes and fewer obstacles facing our employees all help to enhance customer satisfaction.

Mattijs ten Brink

CEO, Transavia

”



As consumer trends and expectations evolve, we partnered with Accenture to leverage new technologies to deliver seamless experiences before, during and after travelour organization.

Jeffrey Loke

Senior vice president, CAG

”



Our team, together with Accenture and the United Nations Environment Programme, have collaborated to develop the first ever net zero roadmap for the whole of the travel and tourism sector. The roadmap includes key milestones and decarbonization corridors for each travel and tourism industry, and it also sets out stretch targets for those who can go faster and further.

Julia Simpson

CEO, World Travel & Tourism Council

Who we work with



Aviation



Hospitality



Others



*this list represents a small selection of clients

About Accenture

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services — all powered by the world’s largest network of Advanced Technology and Intelligent Operations centers. Our 721,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities.

Travel overview & Credentials



Accenture Travel at-a-glance

We serve over

300

travel companies
Worldwide.

We work with

ALL

industry segments
across the entire travel ecosystem.

We work with

80%

of the top 30
airlines.

We work with

9

of the top 10
hospitality companies
globally.

We have

60+

multi-disciplinary offerings, capabilities,
assets and partnerships customized for
Travel.

We foster collaboration with

11

global Innovation Centers, Travel Hubs
and Delivery Centers.

We have

21

ecosystem partnerships
to drive innovation across
the value chain.

We have

5K+

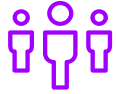
highly-skilled travel practitioners across
the globe.



We work across the entire travel ecosystem



What makes us unique



True travel industry experts

5000+ hand-picked industry experts across the globe.

Powered by dedicated training sessions, courses and learning boards for the travel industry and each of the travel sectors.



Industry-specific innovations

A robust catalog of innovative industry solutions.

Supported by industry insights with access to aviation and hospitality specific data.

Fostering collaboration and innovation with 11 global Innovation Centers, Travel Hubs and Delivery Centers.



Key ecosystem relationships

At the center of travel's broad ecosystem:



Underpinned by Accenture's end-to-end innovation and digital transformation capabilities



01

QUESTION ON THE MINDS OF TRAVEL C-SUITES

WHAT NEW BUSINESS MODELS SHOULD I ACTIVELY INVEST IN AND INCORPORATE INTO MY MODEL IN THE FUTURE? AND HOW DO WE ADDRESS THE SUSTAINABILITY DEMANDS OF TRAVELERS?

Confidential

INTERNAL USE ONLY



Recovery Strategy and Sustainable Growth

What next gen business models do I need to start thinking about now, and how can I evaluate them without being disruptive to my current business? What are the ways to increase our revenues – new revenue streams and/or models? Which new channels could be useful for the new business models? How can we generate new partnerships with new brands? What does the Metaverse mean for me? How do we address the sustainability demands of society and travelers?

OVERVIEW

True diversification requires companies to think beyond the traditional core and ancillary businesses and consider how they can serve customers with new capabilities. Accenture can work with clients to find ways for them to fund and prioritize key initiatives, as well as advise them on the reallocation of resources and investment during their recovery and beyond.

How Accenture can help

- Accenture can bring insight into the broader market, behavior, and trends to proactively define capabilities to help our clients get ahead of these trends. Accenture can provide clients with the ability to fund and prioritize key initiatives, as well as advise them on the reallocation of resources and investment.
- Companies need to rebuild trust and differentiate in the marketplace, which involves an expansion of how they are perceived by customers. They have to mitigate future disruption and business risk identifying alternative revenue streams. This diversification will enable them to leverage current assets (customer base, loyalty, customer data) to build on revenue streams that add to profitability in good times and are more resilient revenue streams during the next downturn.
- A zero-based approach to costs can guide businesses to new levels of profitability in a way that’s not only good for growth but also good for society. The objective is clear: direct, aggressive cost takeout while concurrently improving customer and employee experience. Clients need a way to intelligently grow their business without linear cost growth.

Main Travel Offerings

- **Revenue Diversification:** Accenture can bring insight into the broader market, behavior, and trends to proactively define capabilities to help our clients get ahead of these trends.
- **ZBX for Travel:** Accenture can provide clients with the ability to fund and prioritize key initiatives, as well as advise them on the reallocation of resources and investment during recovery and beyond.
- **Travel Sustainability:** Four strategic themes can help travel companies on their journey towards a sustainable business: 1) Net Zero & Strategy Roadmap; 2) SAF, DAC Offsetting Strategy; 3) Carbon Visibility & Benchmarking; 4) Sustainable Traveler Insights & Communication

Powered by (Assets and Solutions)

- “New” cost structure
- Flexibility Assessment
- Continuous smart spend
- Sustainability: Net Zero Strategy Framework; SAF and DAC Market Analysis; Aviation Carbon Calculator; SF Net Zero Cloud Alliance; Traveler Insights Studies
- New Revenue models
- Portfolio and Brand Strategy
- Next Gen Loyalty and Subscriptions 2.0
- Lowest cost, elastic back office (F&A, IT, HR, etc.)

PoV and Thought Leadership

- [A sustainable recovery for travel companies](#)
- [Travel loyalty—winning travelers' hearts and minds](#)

Learn more

[Accenture Travel: Recovery Strategy and Sustainable growth](#)

Client Stories



Client Stories

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Jesko Neuenburg (Travel Sustainability Global Lead)
Tuba Guclu

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Is it possible to stimulate demand without eroding total revenue? If so, how? How do I target new segments of customers? New motivations to travel? What is the future of loyalty, new ways to attract new customers, drive and capture loyalty? How are traveler expectations evolving? How do I shift from the traditional room/flight to a broader upselling/cross-selling portfolio? How should I transform my distribution model to move towards an attribute-based selling model?

The airline and hospitality industries need a holistic approach to commerce transformation that encompasses technology, people, and processes. Accenture can help you capture demand and compete in a new and packed market while identifying new opportunities and gaps. There is a need to accelerate data-driven and tech-driven transformations of the marketing ecosystem to become a frontrunner in the industry. Also, acquiring more profitable customers while reducing marketing investment will be key. Accenture is a prominent player in Marketing End2End services and has the deep data/AI capabilities needed to enhance the marketing operations of our clients.

How Accenture can help

- Accenture can help clients capture demand and compete in a new and packed market while identifying new opportunities and gaps. There is a need to accelerate data-driven and tech-driven transformations of the marketing ecosystem to become a frontrunner in the industry. Also, acquiring more profitable customers while reducing marketing investment will be key.
- While large companies are still reluctant, small and medium-sized companies have taken the lead in the return to business travel. Proactively address current customers and capture long-tail untapped demand. We are seeing an opportunity in the market to change the approach and move towards a proactive data-driven model to identify look-a-likes and capture new B2B SMB customers.

Main Travel Offerings

- **B2B and SMB Growth for Travel:** capture new B2B and SMB customers. We developed a platform for meetings & events (M&E) and B2B travelers to help Travel companies significantly increase their capability to identify new leads and increase revenues.
- **Intelligent Digital Sales for Leisure:** Bring more customers and get more from my customers: Demand acquisition and conversation through demand identification and qualification to conversion. Leveraging audience modeling and propensity to buy-based campaigns; conversion rate optimization, personalized content and advanced guest/traveler profiling.

Powered by (Assets and Solutions)

- B2B Growth for Travel
- B2B and Leisure CX Transformation
- Intelligent Digital Sales
- Digital Marketing
- Campaign Activation
- Content production at scale
- Creativity Services
- Service Resilience
- Enhance Self-Service
- Brand Strategy

PoV and Thought Leadership

- [Hotels and Airlines Can't Afford to Ignore the Seismic Shift to Leisure](#)
- [Business or leisure?](#)
- [The year of the "new" traveler](#)

Learn more

[Traveler Experience](#)

Client Stories



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How can I continue to retain ownership of the customer to keep my distribution costs low? What new sources of data do I need? How do I get it? Do I need new partners from other industries/segments? What is the best way to distribute broader end-to-end travel content giving customers a one-stop shop? What can I do with existing data – sell it, personalize the experience, get more from it? Do I have the right data insights? How should I engage with my customers? What are my customers new expectations?

Patterns of demand and revenue have changed. Travel companies need to sell more services whether delivered directly or by third parties. Customer expectations have also changed – they have long wanted digital services, but now they need them to simplify what is a more complex travel journey. Customer expectations no longer respect industry boundaries. The direct channel is key to both selling new services and managing all services. And over the medium- and long-term, direct access to data to personalize sales and service touchpoints will strengthen customer relationships, which in turn will drive loyalty and customer lifetime value.

How Accenture can help

- There is significant value in transforming the direct channel experience, offering a differentiated product and seamless retail experience that surpasses any third-party proposition. We believe the Travel Industry should move toward a Business of Experience (BX) model. BX is a holistic approach that allows organizations to become customer-obsessed and reignite reliable growth. Mindset: The direct channel needs to sell to many and service all customers. Retail Paradigm: Bring solutions to sell the most complex products directly to customers Instead of selling commoditized products through the direct channel and bespoke through indirect. Offer coupled with Order Management will be the fundamental driver of changing travel economics.
- We will support our clients to build confidence and give travelers peace of mind. We offer proven initiatives to eliminate / reduce contacts and improve customer care economics and experience.

Main Travel Offerings

- **Airline Retailization of Travel (ART):** ART can help airlines realize the art of the possible, achieving new levels of customer-centricity while simplifying processes and building a solid foundation for future growth.
- **Net New Revenue Platform (NNRP):** opening retail to travelers at every point in the journey; combine core products of the client with third-party retail offers and discounts.
- **Travel Care:** CRM Transformation

Powered by (Assets and Solutions)

- Total Offering Optimization
- Marketplace & Distribution Management
- Multi Airline Integration
- Total Journey Optimization
- Pax Personalization and Services
- Connected Traveler

PoV and Thought Leadership

- [How Hospitality Brands Can Scale Operations and Get Back to Growth, at the Right Cost](#)
- [Hotels and Airlines Can't Afford to Ignore the Seismic Shift to Leisure](#)

Learn more

[Retail in Travel](#)

Client Stories



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04

QUESTION ON THE MINDS OF TRAVEL C-SUITES

HOW DO I BUILD A SUSTAINABLE MODEL AND OPERATE AT VARIABLE COST WITHOUT INHIBITING DEMAND?

Confidential

INTERNAL USE ONLY



Data-led Travel Operations

How can I reduce and optimize my operation costs? How do I manage my cost model – be prepared for the next pandemic wave? How do I manage to retain profitability with the cost pressures and inflation? What functions are core and differentiating and thus require ownership and investment and what are commodities that could be delivered at lowest cost? How do I retain and attract the best talent? How do I deal with workforce challenges – labor shortages, the war for talent, I&D?

OVERVIEW

Travel companies need to increase their responsiveness and flexibility to ensure the resilience of the company in the long-term. By implementing the right technologies, travel companies would be able to execute consistent and repeatable processes and be empowered to make the right decisions. Access to data will be critical for travel companies to rebuild for long-term sustainable growth and position them better to deal with the volatility to come. By providing real-time insights on the right indicators, travel companies are far better equipped to make informed decisions and respond at a much quicker rate.

How Accenture can help

- Create an agile, insight-rich organization while reducing costs and improving operational efficiencies with consistent and repeatable processes. Travel companies need to reduce their operations expenses while improving overall business efficiency, bearing in mind that customers now have new needs and greater demands than ever before. Our clients need to connect with customers, improve the bottom line, and seize new growth opportunities.
- Tap into cross-organizational data insights and travel indicators to sharpen responsiveness and improve operational performance and customer experiences. Travel clients need a holistic approach to harness technology to achieve effective significant operational improvement, new revenue opportunities, and a pathway to complete transformation.

Main Travel Offerings

- **Hospitality Management Services** is an end-to-end business service offering for our travel clients. Powered by Oracle Cloud and using a finance-as-a-service model, it gives clients the ability to have Accenture operate their F&A activities.
- **Aviation Intelligent Services** : Accenture has combined its global expertise to develop a unique offering, providing a solution to adapt our Airline and Airport Advanced Analytics solutions to provide clients with the insights they need. AISP is fast to deploy, adaptable to unique environments, and a fully-supported data platform that has been adapted to support our clients in creating a better business.
- **Hyper Automation in Travel:** Automation and simplification of back-office processes. Create an agile, insight-rich organization while reducing costs and improving operational efficiencies with consistent and repeatable processes.

Powered by (Assets and Solutions)

- Accenture Hospitality Management Services (AHMS) – Oracle Cloud
- Finance & Accounting
- Procurement
- Property Operations
- Passenger & Ground Operations
- Analysis & Optimization
- Digital Hangar
- Airport Route Performance
- Fleet, Schedule & Network Planning/On time Performance
- Cargo Performance Improvement & Suite
- Predictive Modelling
- Integrated Data Object
- IRROPS Integrated Data Object
- Video Analytics

PoV and Thought Leadership

- [Make bold moves with intelligent travel operations](#)
- [How to be a data-powered travel organization](#)

Learn more

[Accenture Travel: Intelligent Operations](#)

[Accenture Travel: Travel Intelligent Services](#)

Client Stories



Lufthansa



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How do I shift mindsets toward investing in agility and scale? How can I create a solid foundation for change?

Travel C-Suites understand the need for services that elevate the travel experience in an operating model that drives flexible cost structures and greater automation in the right areas. This is key to recovering the bottom line and improving revenues. To realize this dual agenda, travel companies can't rely on existing systems that are bending under the weight of travel value chain complexity. Acting with urgency to be ready for the future tops the C-Suite agenda, and it requires shifting mindsets toward investing in agility and scale.

How Accenture can help

- Accenture has the end-to-end capabilities to assess a client's maturity across Living Systems tenets to curate an incremental transformation roadmap lined with cost takeout and revenue building opportunities.
- Cloud-based solutions amplify the services, processes, and assets for businesses to outmaneuver uncertainty, drive enduring business growth and deliver value at speed & scale.
- Living systems implementations enable business and IT transformation as well as operations optimization, where continuous innovation becomes an integral way of working that aligns to the relevant business needs.

Main Travel Offerings

- **Journey Through the Cloud:** With Accenture, enterprises can harness the full value of cloud with confidence- securely migrating, managing, and innovating to drive greater agility and business performance.
- **Technology Transformation:** Accenture has the end-to-end capabilities to assess a client's maturity across Living Systems tenets to curate an incremental transformation roadmap lined with cost takeout and revenue building opportunities.

Powered by (Assets and Solutions)

- Rapid Business Case (MyNav)
- Future Cloud 7R disposition (MyNav)
- Cloud Architecture, Mgmt. and Delivery Factory
- Green Cloud
- Living Systems Diagnostics toolkit
- Value Tree & KPI framework
- Automation Opportunity Exploration

- Living Systems Diagnostics toolkit
- Value Tree & KPI framework
- Automation Opportunity Exploration
- Rapid POCs for Sustainable innovation
- Platform / Ecosystem Advisory
- MyIndustry for Travel (Care play)
- ERP Transformation using MyConcerto
- PMS/CRS Strategy

PoV and Thought Leadership

- [The Right Cloud Mindset in Travel](#)
- [How Technology can solve talent scarcity in travel](#)
- [How to be a data-powered travel organization](#)

Learn more

[Accenture Travel: Travel Living Systems](#)

Client Stories



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How do I deal with workforce challenges – labor shortage, war for talent, Inclusion and Diversity ?

OVERVIEW

Travel companies need to look critically at how they can build an effective organization that is fit for purpose and cost-efficient to outmaneuver uncertainty while improving the overall experience of their employees

How Accenture can help

- The effects of uncertainty on the travel workforce have highlighted the need to deliver more favorable and flexible employment terms, making it easier for travel companies to respond to events that cause fluctuations in capacity and take greater responsibility for the care of their people in both the good and bad times.
- Operating models have to change rapidly and significantly due to the new context. Effectively calculating who we need, for what, and how many will be key in building a more efficient and effective workforce, and creating more satisfying roles for employees.

Main Travel Offerings

- **Workforce Transformation for Travel:** Accenture has industry experience combined with relevant expertise in operating models. Our workforce management insights with our operations, automation, and digital capabilities make us the perfect partner to define and execute our clients' vision, providing solutions tailored to each client.

Powered by (Assets and Solutions)

- Modern and Digital HR
- Future Workforce
- Accelerating Learning and New skilling
- Return to work

PoV and Thought Leadership

- [Hospitality companies – Rebuilding Travel Industry Livelihoods](#)

Learn more

[Accenture Travel: Workforce Excellence](#)

Client Stories



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COMMERCIAL STRATEGY CONFERENCE

Strategize, Optimize, Capitalize



26 July 2024

THE LEELA AMBIENCE GURUGRAM HOTEL, DELHI NCR, **INDIA**

