



PHOENIX

2019 Global Travel Agent GDS Report

Prepared for: **TravelClick**
an amadeus company

Objectives

- _ Evaluate the effectiveness of marketing among the global travel agent community.
- _ Measure and monitor changes in travel agent awareness of specific GDS media and promotional messages.
- _ Evaluate the frequency with which travel agents use GDS marketing tools.
- _ Determine how GDS media is used in conjunction with other materials and information sources available to travel agents.
- _ Ascertain the level of satisfaction that agents have with the media messages.
- _ Determine the accuracy and timeliness of the information presented.



Methodology

MARKET REPRESENTATION

907 agents from 47 countries responded:

Albania	Canada	Indonesia	Nigeria	Switzerland
Andorra	Chile	Ireland	Pakistan	Trinidad & Tobago
Angola	Chinese Taipei	Italy	Panama	Turkey
Argentina	Colombia	Kenya	Philippines	United Arab Emirates
Australia	France	Malawi	Portugal	United Kingdom
Austria	French Polynesia	Malaysia	Russia	United States
Bahamas	Germany	Mexico	Saudi Arabia	Venezuela
Belarus	Greece	Morocco	Singapore	
Belgium	Hong Kong	Netherlands	South Africa	
Brazil	India	New Zealand	Spain	

	Total Agents	NORAM	LATAM	EMEA	APAC
Amadeus	302	75	35	140	52
Sabre	302	194	31	44	33
Travelport Galileo	275	42	8	109	116
Travelport: Worldspan	28	15	3	3	7
Total	907	326	77	296	208
Statistical accuracy at 95% confidence level	± 3.3 % points	± 5.4 % points	± 11.2 % points	± 5.7 % points	± 6.8 % points

Methodology

Sample Source

Sign-on messaging and banner ads within the global distribution systems

Interview Dates

June 10, 2019 through July 9, 2019

Interview

Online methodology, 15-minute duration

Incentive

\$5 U.S. Amazon.com gift certificate was offered to each respondent participating in the study.

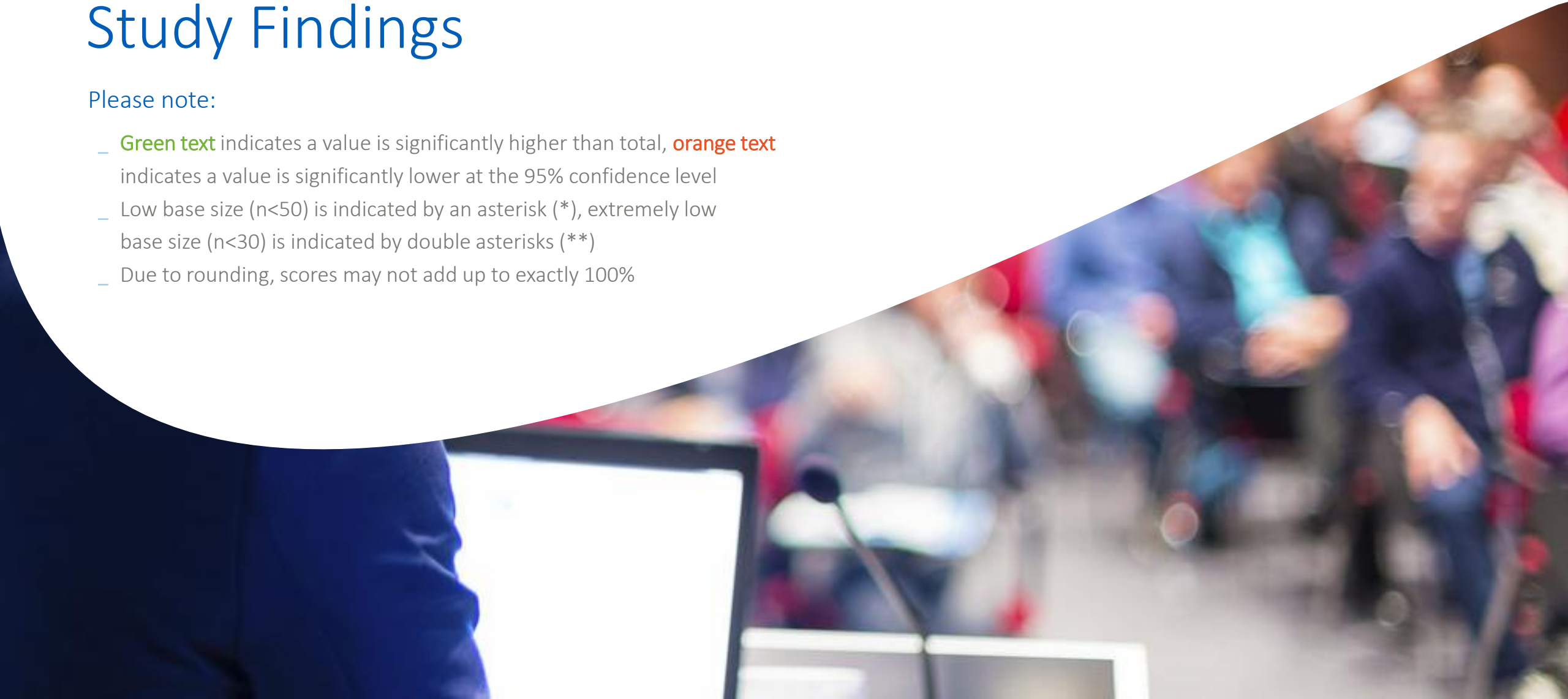
Findings

The findings reported are among total travel agents and agents in North America (NORAM), Latin America (LATAM), EMEA, and Asia/Pacific (APAC) regions.

Study Findings

Please note:

- _ **Green text** indicates a value is significantly higher than total, **orange text** indicates a value is significantly lower at the 95% confidence level
- _ Low base size ($n < 50$) is indicated by an asterisk (*), extremely low base size ($n < 30$) is indicated by double asterisks (**)
- _ Due to rounding, scores may not add up to exactly 100%



2019 will be an all-time record year for travel agent hotel bookings

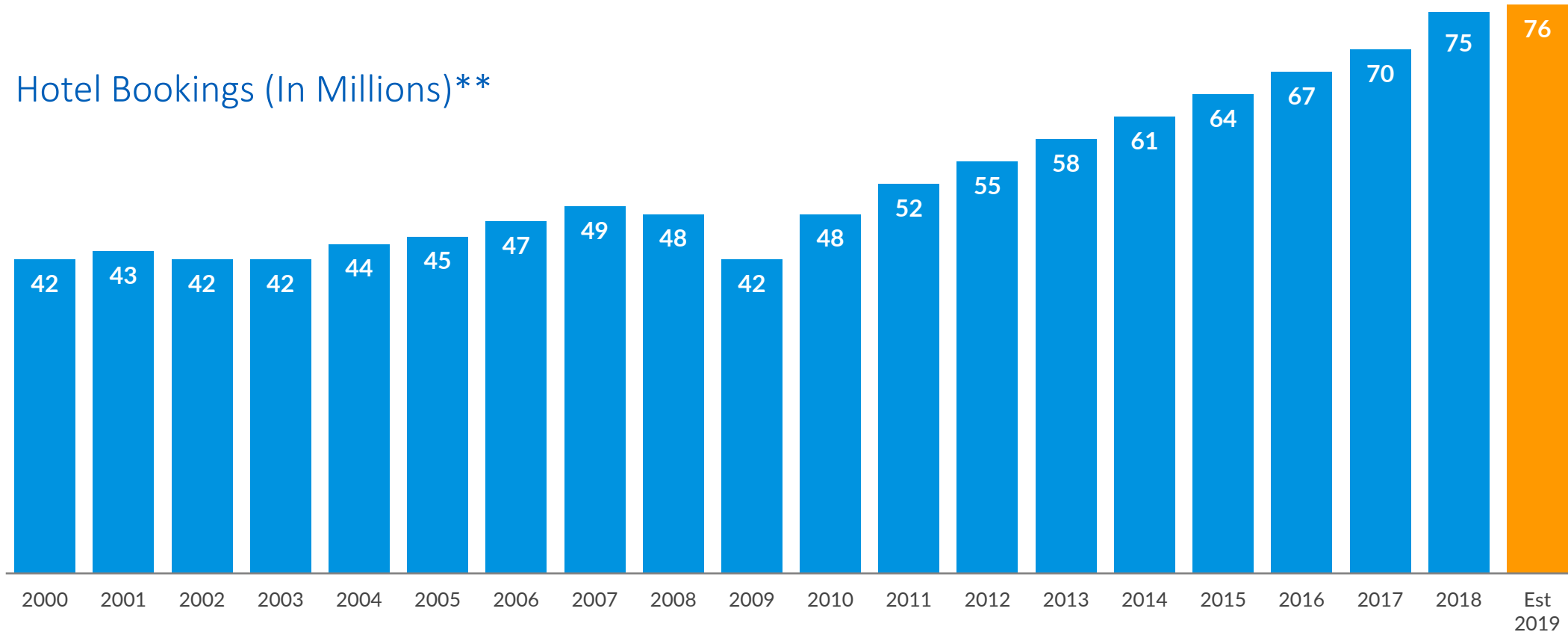
Travel agents are booking more hotel reservations through GDS than ever before, making the channel a prime opportunity for hotels looking to boost group and transient business.



GDS is a bigger-than-ever opportunity to capture a captive audience

Travel agents book 22x more hotels than consumers — and they do it on GDS*

Hotel Bookings (In Millions)**

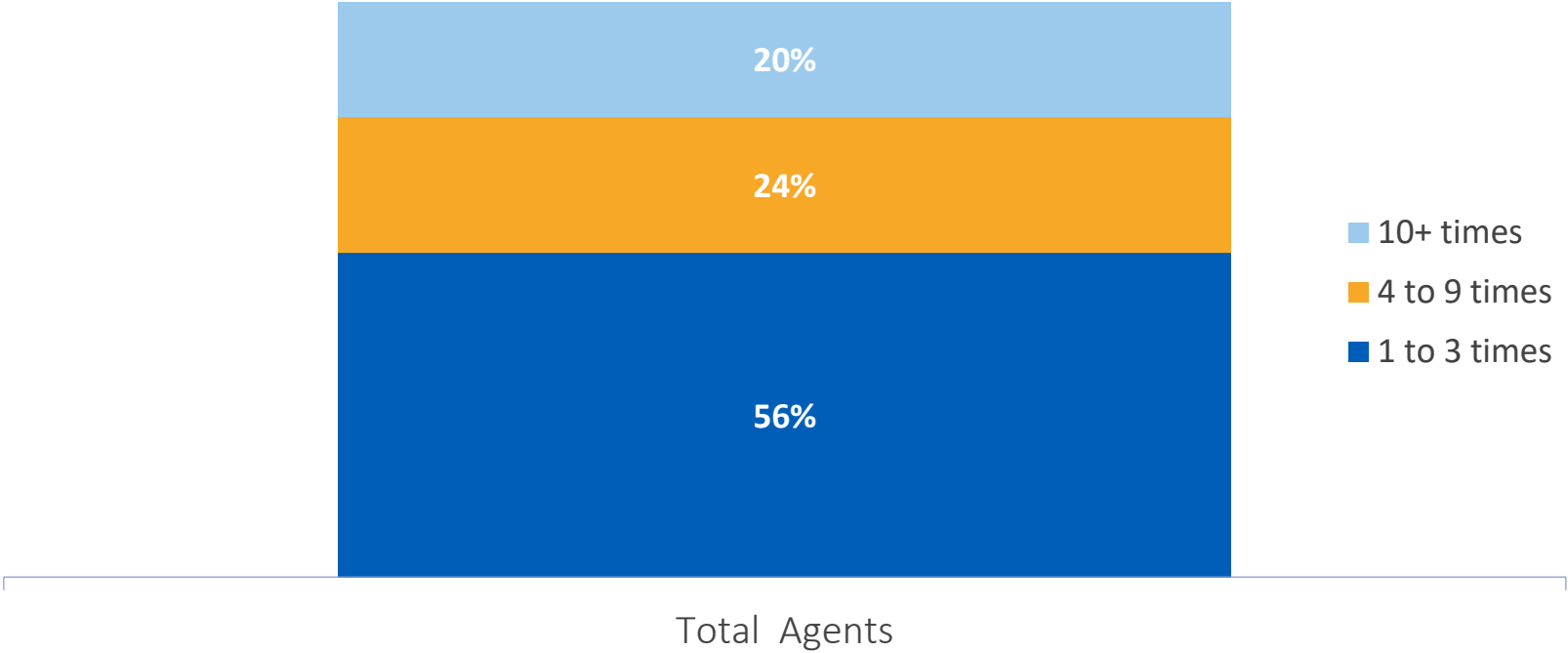


*Source: Sabre research

**Source: TravelClick Agency360

Agents log-in to GDS or emulate a different PCC at least 1-3 times daily

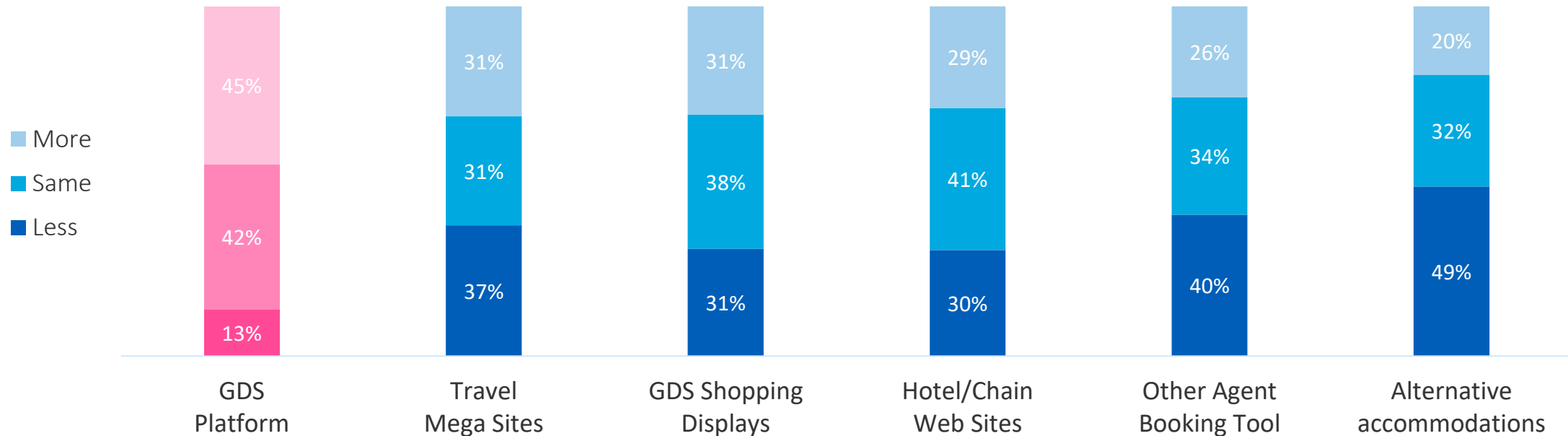
Serving different clients within multiple books of business



Q: How many times do you log onto the GDS on average per day, or emulate into a different PCC to book hotels?

GDS usage is increasing at a faster rate than other channels

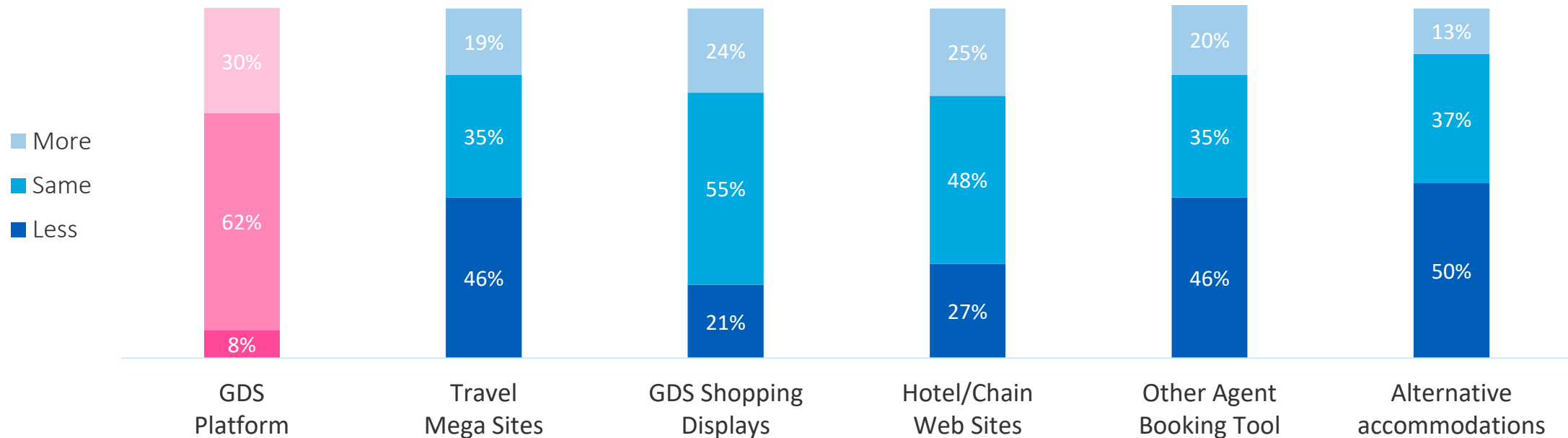
But the other channels are still growing, so a healthy distribution mix is essential



Q: Compared to two years ago, would you say that you are using the following reservations channels more, about the same, or less?

NORAM agents are booking almost exclusively through GDS

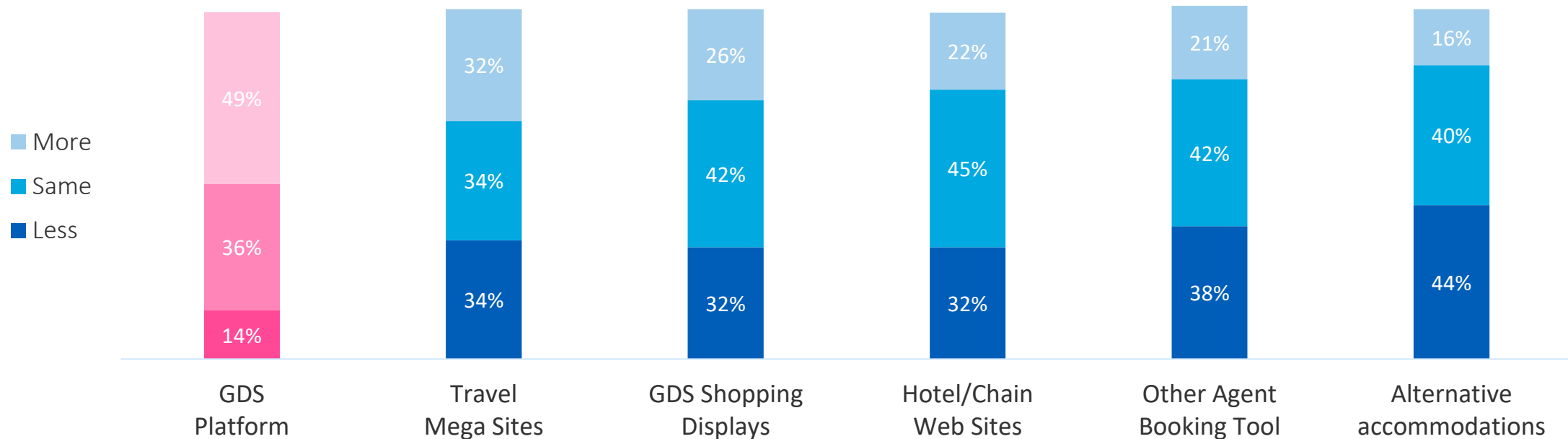
And they are shopping primarily through GDS shopping displays or brand.com



Q: Compared to two years ago, would you say that you are using the following reservations channels more, about the same, or less?

Nearly half of LATAM agents are using GDS more often

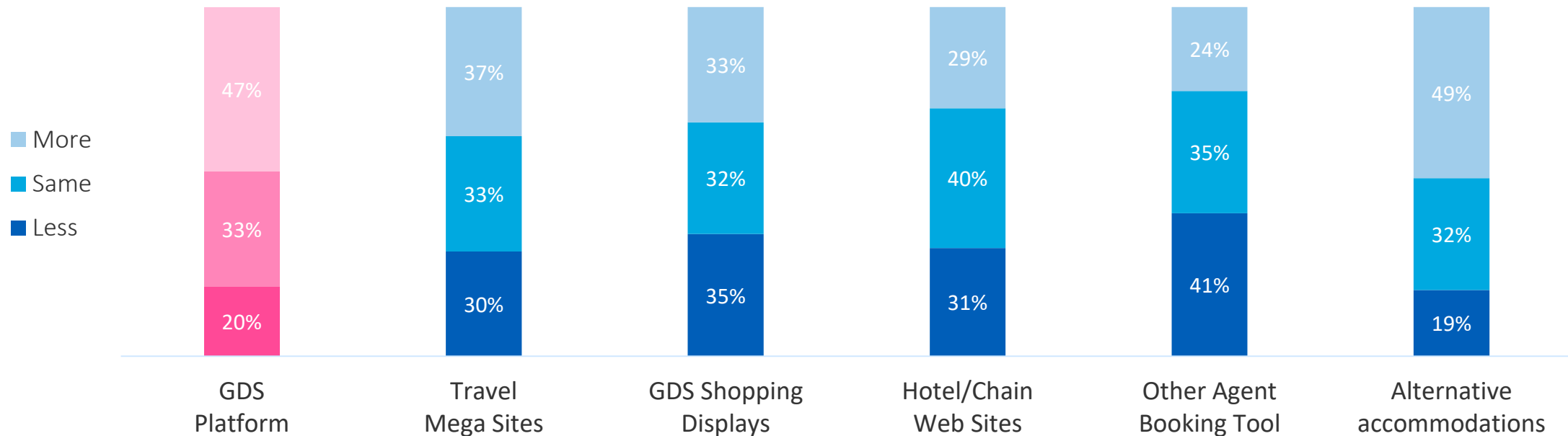
But your distribution mix should consider travel mega sites and brand.com as well



Q: Compared to two years ago, would you say that you are using the following reservations channels more, about the same, or less?

Nearly half of EMEA agents are using GDS more often

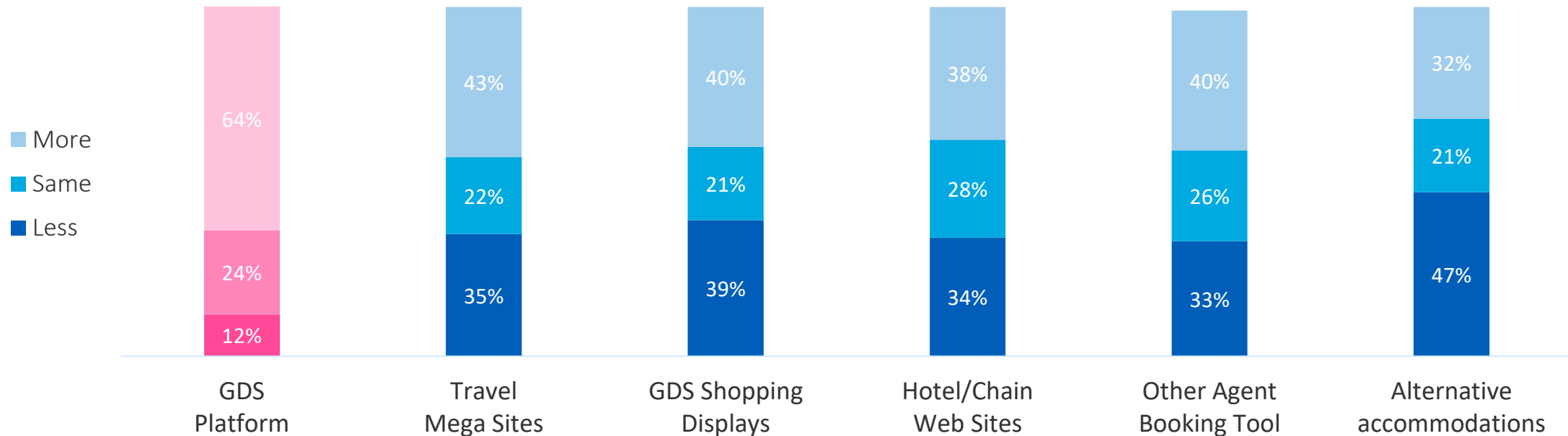
Your distribution mix should also consider travel mega sites and alternative accommodations



Q: Compared to two years ago, would you say that you are using the following reservations channels more, about the same, or less?

Distribution mix is especially important in APAC

Travel agents are significantly more likely to use these channels than agents in other regions



Q: Compared to two years ago, would you say that you are using the following reservations channels more, about the same, or less?

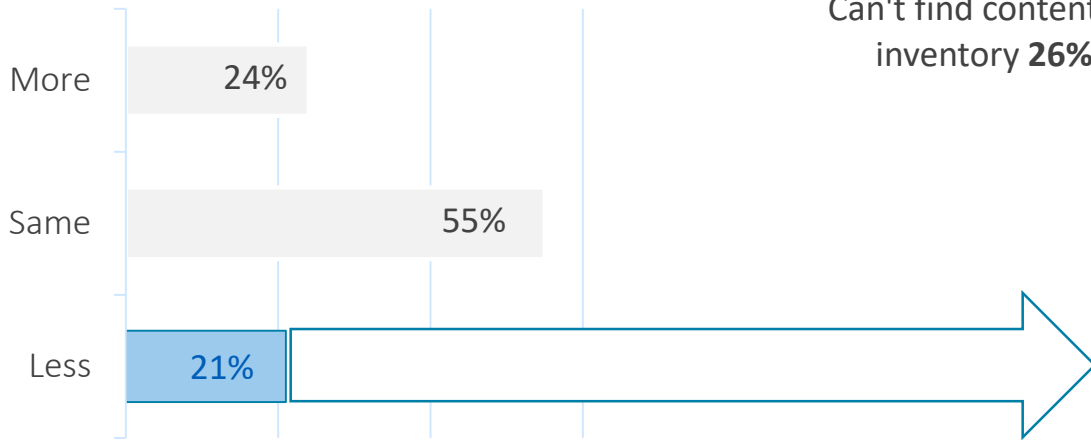
Why are some agents using
GDS shopping less frequently?



Agents in NORAM are finding better rates outside the GDS

They're also most likely to be unable to find the content or inventory they're looking for

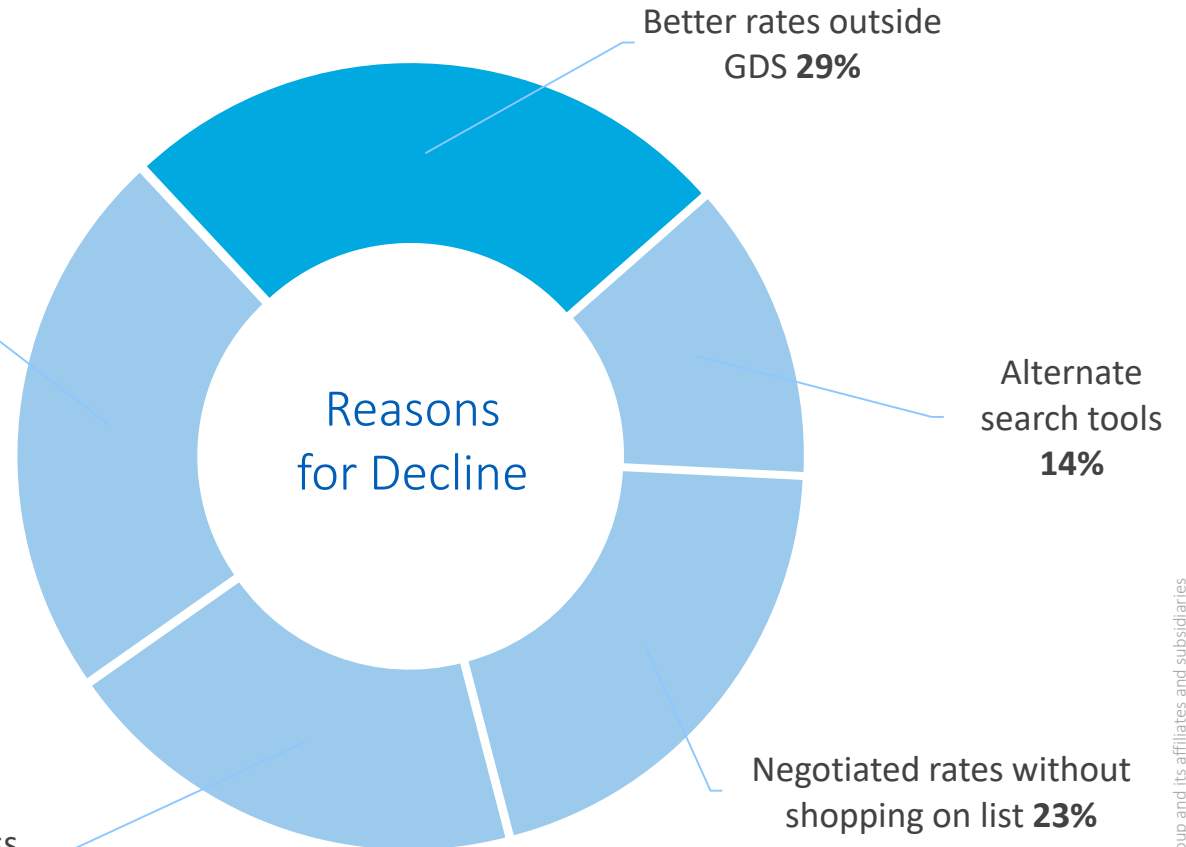
GDS Usage



Q: Why are you using the GDS Shopping Display less than you were two years ago?

Can't find content or inventory **26%**

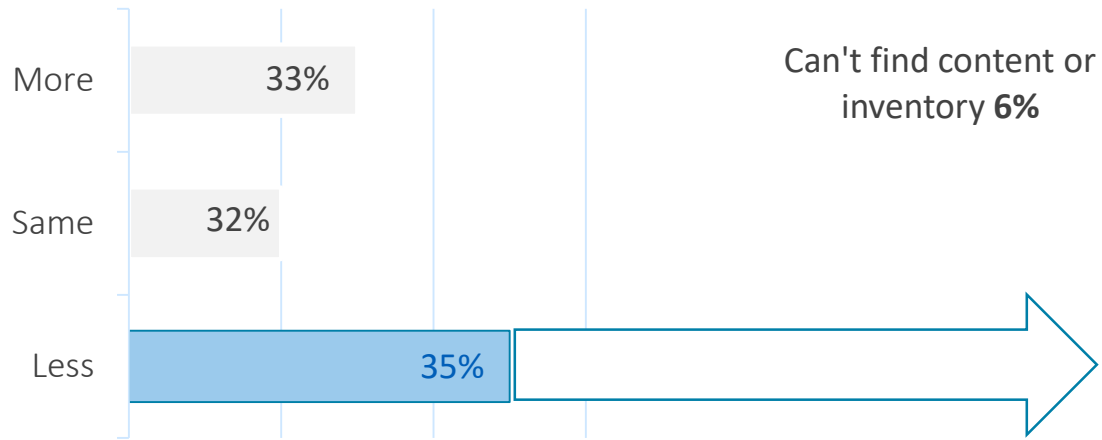
Go directly to seamless CRS rates **22%**



Half of agents in EMEA find better rates outside the GDS

And are most likely to have negotiated rates outside list shopping

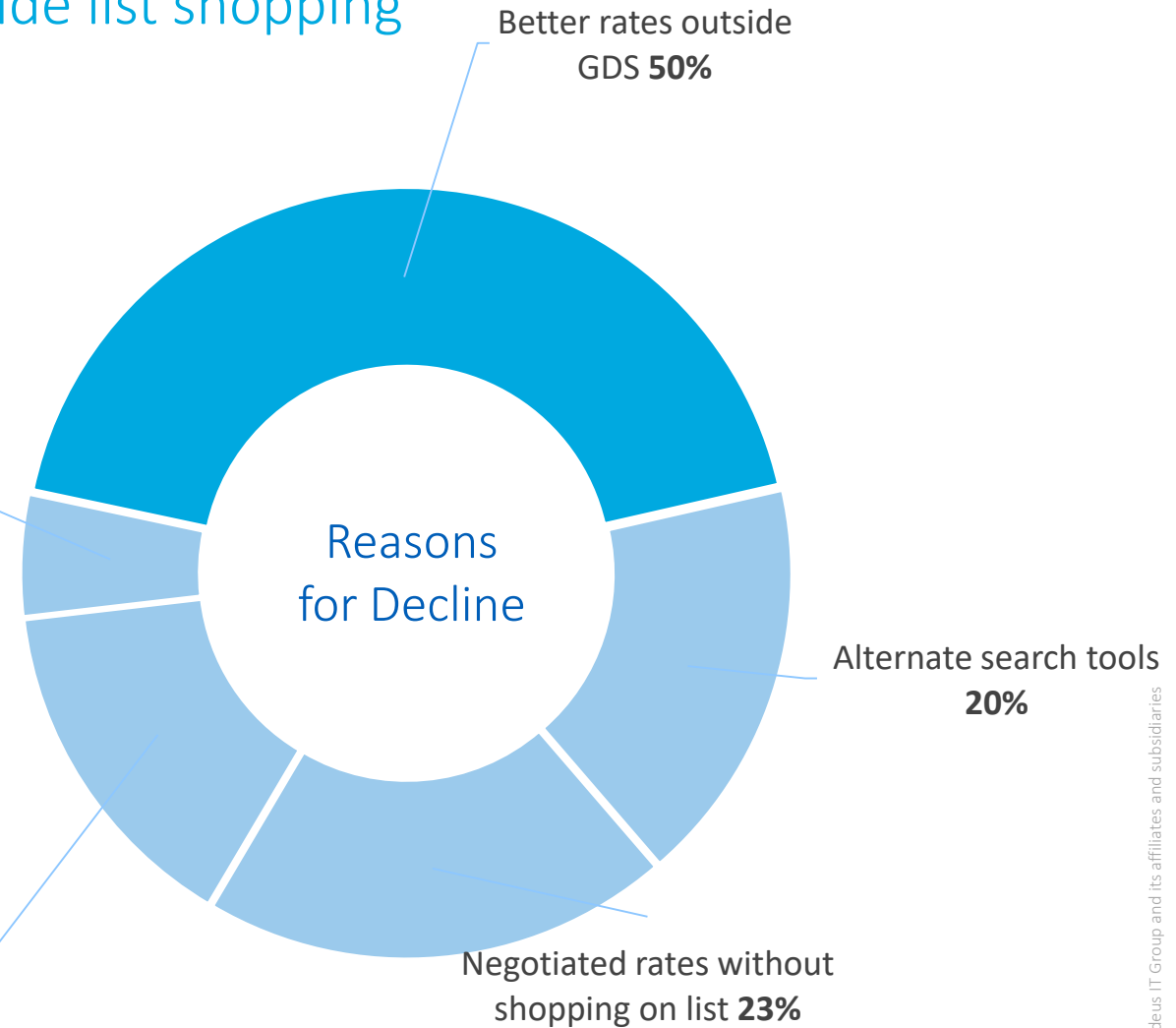
GDS Usage



Q: Why are you using the GDS Shopping Display less than you were two years ago?

Can't find content or inventory **6%**

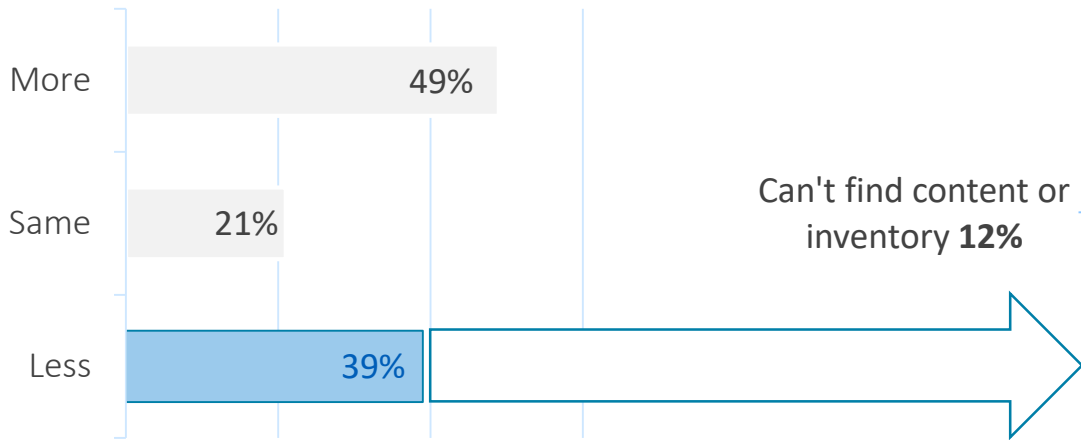
Go directly to seamless CRS rates **17%**



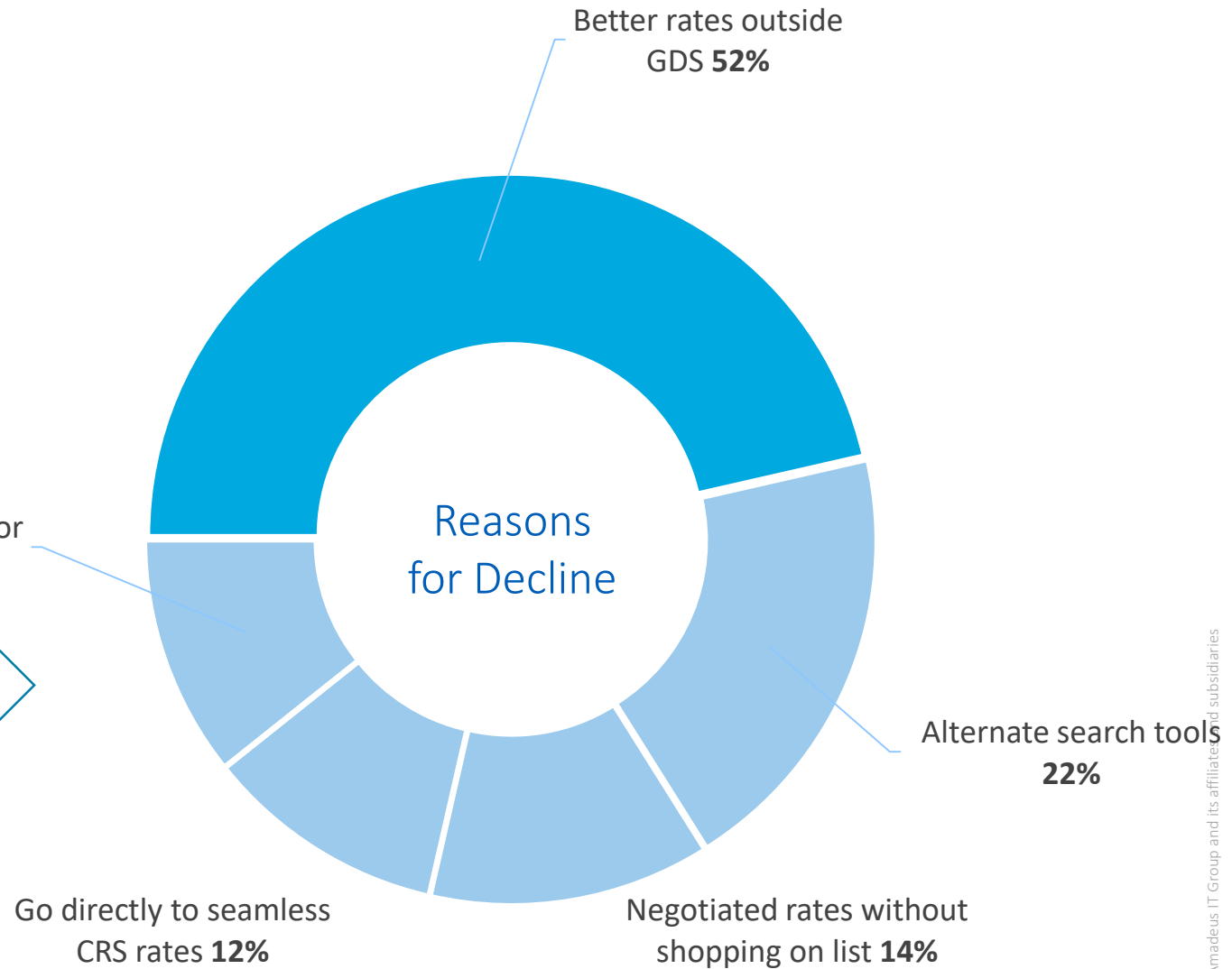
Over half of agents in APAC find better rates outside the GDS

And they're using alternate search tools

GDS Usage

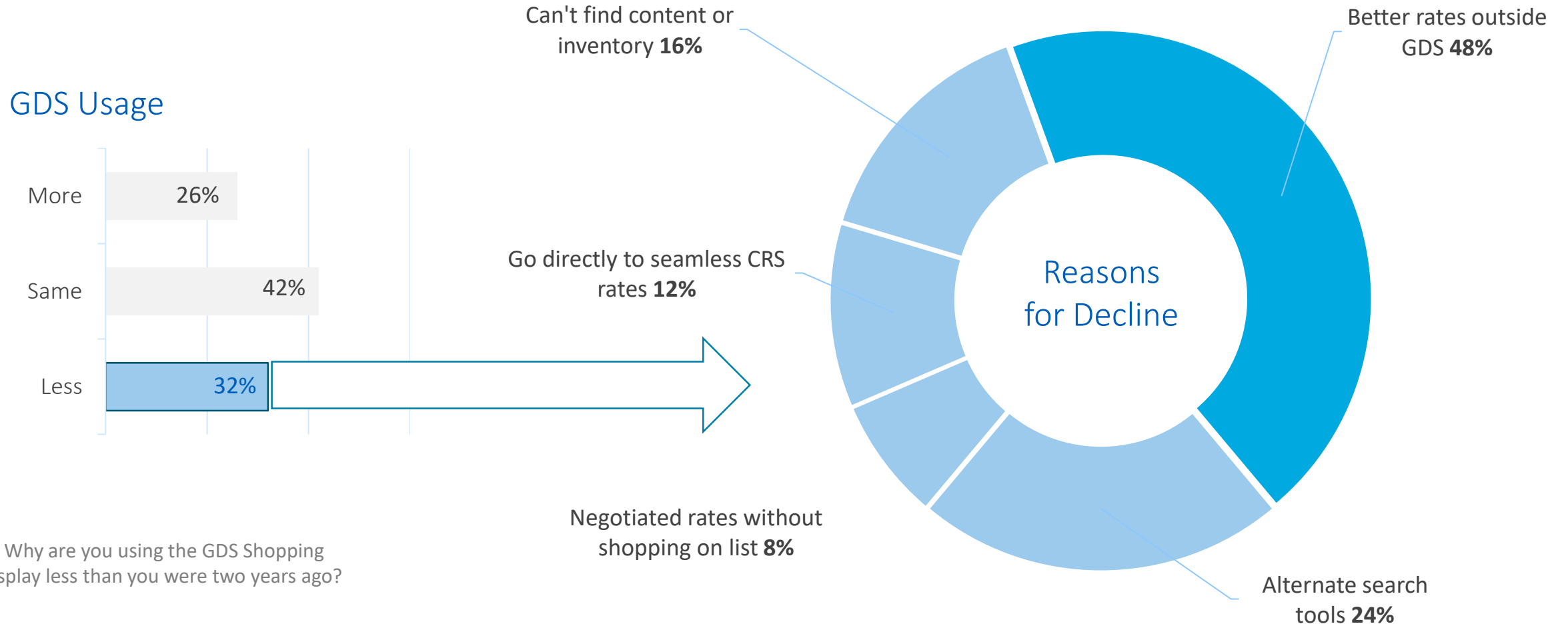


Q: Why are you using the GDS Shopping Display less than you were two years ago?



Nearly half of agents in LATAM find better rates outside GDS

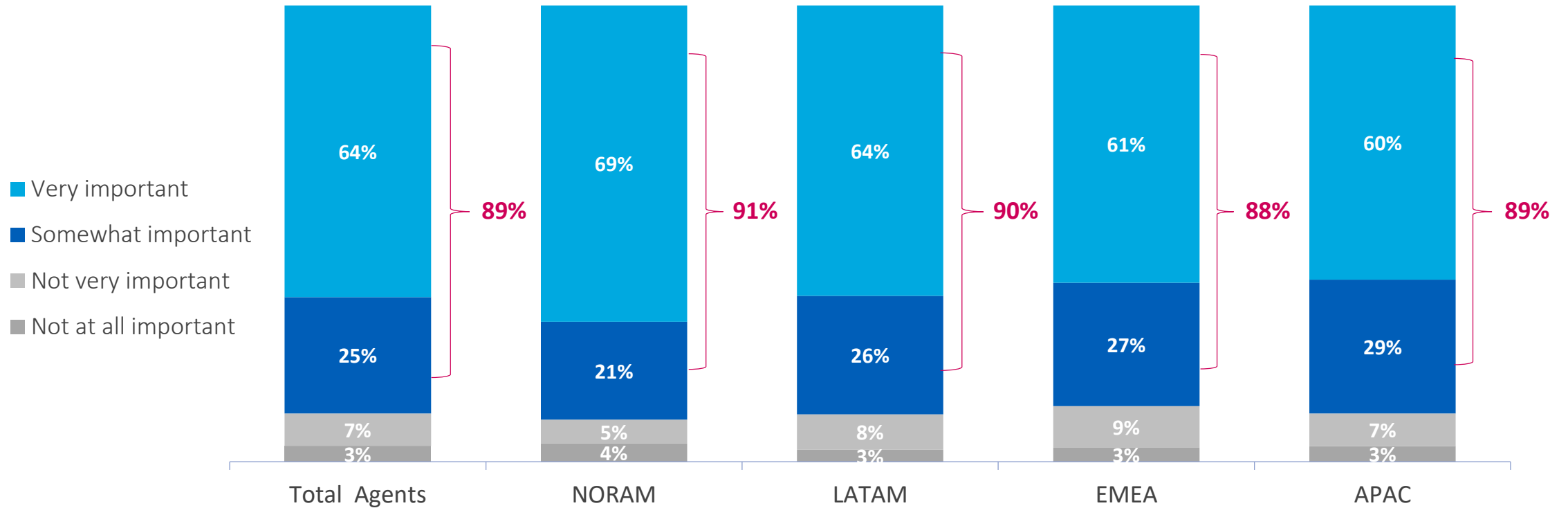
They're also the most likely to use alternate search tools



Q: Why are you using the GDS Shopping Display less than you were two years ago?

Rate parity is essential to success on the GDS channel

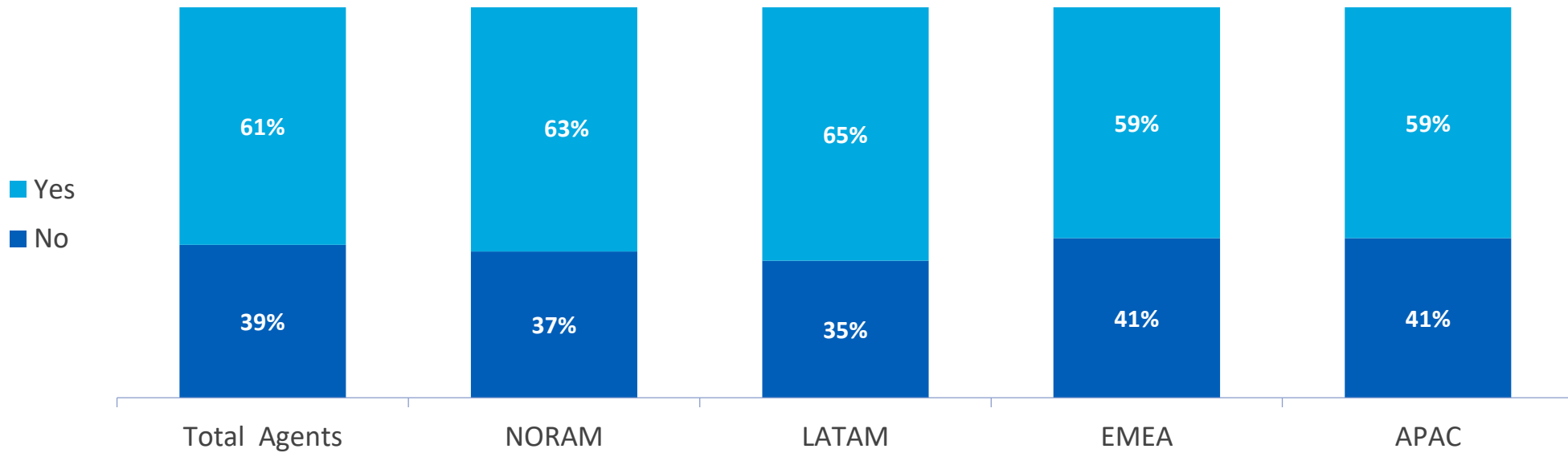
Travel agents worldwide consider rate parity to be important



Q: How important is it to you to know that the GDS can offer rate parity (Very important, somewhat important, not very important, not at all important)?

Agents actively book away from hotels that don't offer full rate parity

3 out of 5 travel agents worldwide avoid hotels that don't offer rate parity across GDSs



Q: When a hotel property does not offer full GDS rate parity, do you actively book away from that hotel property?

Key takeaways

- 2019 will be a record year for GDS hotel bookings:** And your hotel's opportunity for revenue is growing with it.
- Travel agents on GDS are a growing captive audience:** While they search on other channels, financial and workflow incentives ensure GDS is the only place they go to book.
- A healthy distribution mix is essential to a hotel's success:** This is particularly important LATAM, EMEA and APAC.
- Rate integrity is important to all agents worldwide:** Their job is to get the best rate available for their client. Maintaining rate parity across all channels (not just GDSs) is crucial to retaining travel agent business



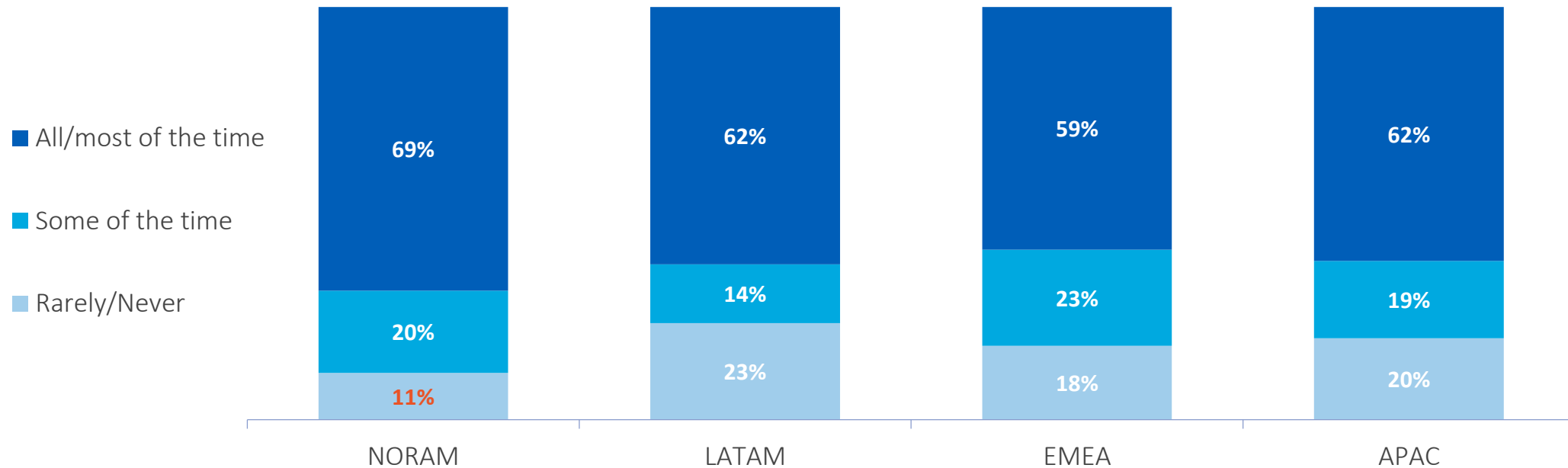
SEO: It's not just for Google

Breadth, depth, and quality of content on your hotel's profile and advertisements on GDS are the key to appearing at the top of searches and giving travel agents the information they're looking for



Most agents rely on hotel description (HOD) details

Especially when booking or researching a property



Q: How often do you view the Hotel Description details of a property when making a booking or researching a property?

Make sure your HOD has the information travel agents are looking for

And keep it consistent

	Total Agents	NORAM	LATAM	EMEA	APAC
Property rating and photos	57%	59%	57%	53%	58%
Hotel Services	54%	57%	54%	52%	51%
Hotel Amenities	53%	65%	45%	45%	46%
Policy information	43%	53%	36%	43%	30%
Attractions/Points of Interest	34%	28%	34%	33%	45%
Other	11%	12%	15%	8%	10%

Q: What specific information do you look for/use most when viewing the (HOD) hotel details?

Make sure your HOD has the information travel agents are looking for

Property rating and photos

```
XX0012345 HOTEL X
ADDR-      123 NORTH STREET
           CITY STATE ZIP
PHONE-     1-999-999-9999
FAX-       1-999-999-8888
RATING-    NTM 4 CROWN
** DIRECT CONNECT PARTICIPANT **

US GOVERNMENT SAFETY/FIRE APPROVED

ADDITIONAL FEES MB FOR ACCEPTABLE FORMS OF PAYMENT
TAX - 16.445PCT / . / 14PCT LOD
EXTRA PERSON - * 25.00 USD TO SELL USE /EX-1
ROLLAWAY - * 0 USD TO SELL USE /RA-1
CRIB CHARGE - * 0 USD TO SELL USE /CR-1

AIRPORT SHUTTLE -Y- PET POLICY -Y-
CAR RENTAL COUNTER -N- - FAMILY -N-
```

Make sure your HOD has the information travel agents are looking for

Hotel services

```
*SERVICES -
WI-FI INTERNET ACCESS

AIRPORT 1 SHUTTLE
BELLMAN
BREAKFAST CONTINENTAL
BUSINESS CENTER SERVICES
COCKTAIL
COMPUTER
COPY SERVICE
DOCTOR ON CALL
DRY CLEANING
EARLY CHECKIN
EVENING TURN DOWN
EXPRESS CHECKOUT
FAX OUTGOING
LATE CHECKOUT
LOCAL CALLS
LONG DISTANCE ACCESS
PARKING - GARAGE OR COVERED
PARKING - VALET
ROOM UPGRADE CONFIRMS
TOUR DESK
WAKE UP CALL

AV EQUIPMENT
BREAKFAST BUFFET
BREAKFAST FULL
BUSINESS CENTER
COFFEE
CONCIERGE
CREDIT CARD ACCESS
DRY CLEANING SAME DAY
EARLY CHECKIN GUARANTEE
EARLY CHECKOUT PENALTY
EXPRESS CHECKIN
FAX INCOMING
LATE CHECKOUT GUARANTEE
LAUNDRY VALET
LOCAL FAXES
NEWSPAPER
PARKING - HANDICAP
PARKING
ROOM UPGRADE ON AVAILABILITY
VIDEO BILLING
WELCOME GIFT
```

Make sure your HOD has the information travel agents are looking for

Hotel amenities

STANDARD AMENITIES IN ALL ROOMS

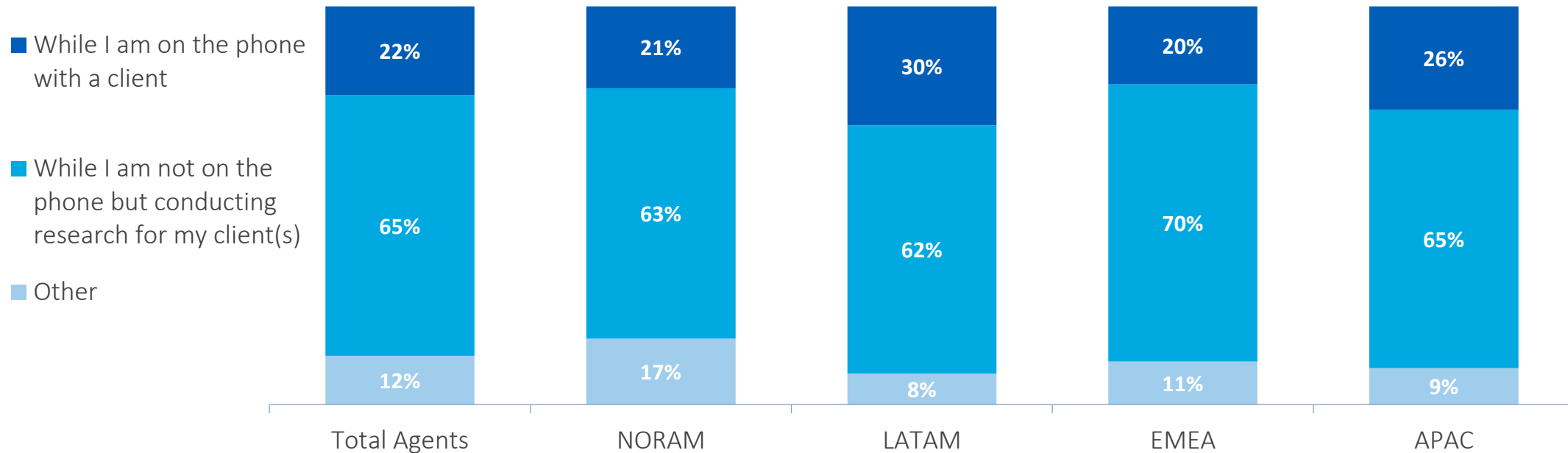
ALARM CLOCK
BATHTUB AND SHOWER
CABLE TV
COLOR TV
DIRECT DEAL
FULL SIZE MIRROR
HSPD
MOVIES
NUMBER OF CLOSETS 1
PHONE TWO LINES
RADIO
SAFE CHARGE 0.00
SAFE
SHOWER ONLY
SPARE ELECTRIC OUTLET
MD<<
VOICEMAIL

ALL OTHER ROOM TYPE AMENITIES

BATHROOM AMENITIES

BATHTUB ONLY
COFFEE TEA
CORDLESS PHONE
ELECTRICAL OUTLET DESK
HAIR DRYER
IRON BOARD
NEWS
NUMBER OF PHONES 1
PRIVATE BATH
REMOTE TV
SAFE FOR LAPTOP
SELF CONTROLLED HEATING
SHOWERSTALL
SPEAKER PHONE

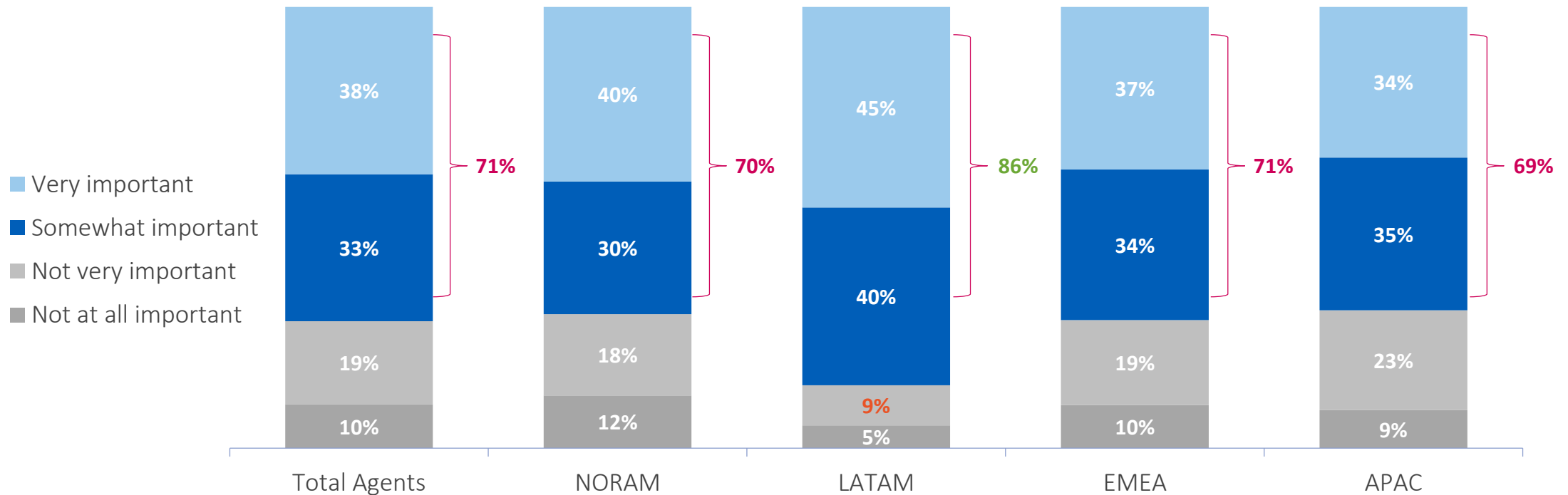
Hotel property photos are important to agents conducting research for clients



Q: When do you typically view hotel property photos from GDS advertising?

71% of agents think including the property ID in an ad is important

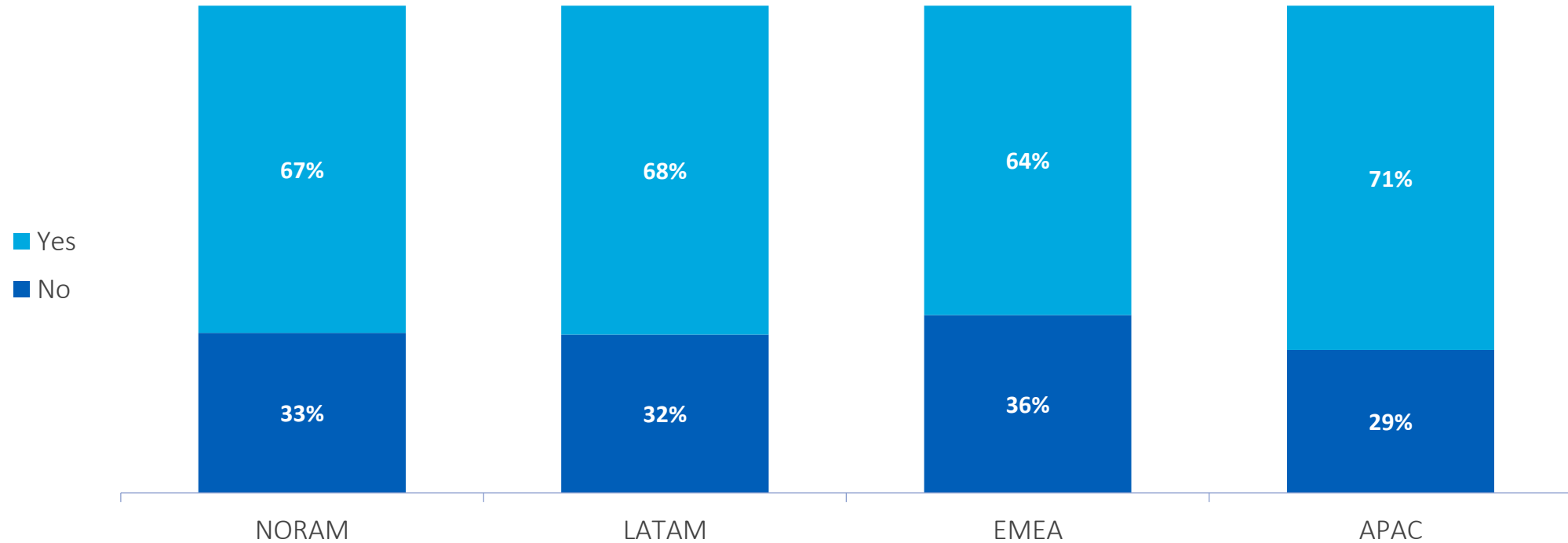
Particularly agents in LATAM



Q: How important is it to have the property ID provided in an advertisement?

Offer quality is more important than screen type

Two-thirds of agents will book because of an ad with a great offer, regardless of the screen type.



Q: Regardless of what type of screen you see the promotional message on air, car, or hotel, would you book that hotel if a great offer?

Price is top concern for all travel agents booking a hotel
Rate- and discount-related keywords are most effective in advertising campaigns



Q: What keywords would help drive you to book a hotel based on advertising?

NORAM agents look for discounts and key hotel information

They also want to know the hotel's rating, and any perks they might get for booking



38%

Special Offer, Rate, Discount, Promotion



25%

Hotel Location, Information, Amenities



14%

Hotel Rating, Star Category, Price



11%

Commission, Perks for Agent

Q: What keywords would help drive you to book a hotel based on advertising?

LATAM agents want to see discounts and key hotel information

They also want to know the hotel's rating and code



38%

Special Offer, Rate, Discount, Promotion



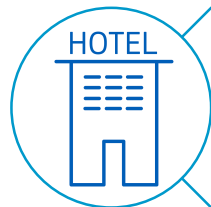
28%

Hotel Location, Information, Amenities



8%

Hotel Rating, Star Category, Price



8%

Hotel name, Code

Q: What keywords would help drive you to book a hotel based on advertising?

Nearly half of EMEA agents look for offers and hotel information

They also want to know the hotel's rating and code



45%

Special Offer, Rate, Discount, Promotion



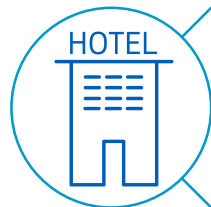
20%

Hotel Location, Information, Amenities



14%

Hotel Rating, Star Category, Price



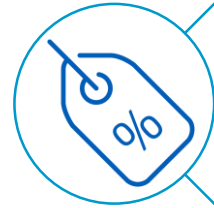
9%

Hotel name, Code

Q: What keywords would help drive you to book a hotel based on advertising?

Nearly half of APAC agents look for offers and hotel information

Hotel rating is more important here than in other regions



43%

Special Offer, Rate, Discount, Promotion



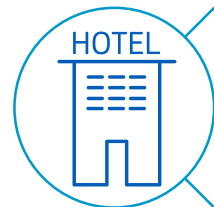
19%

Hotel Rating, Star Category, Price



11%

Hotel Location, Information, Amenities



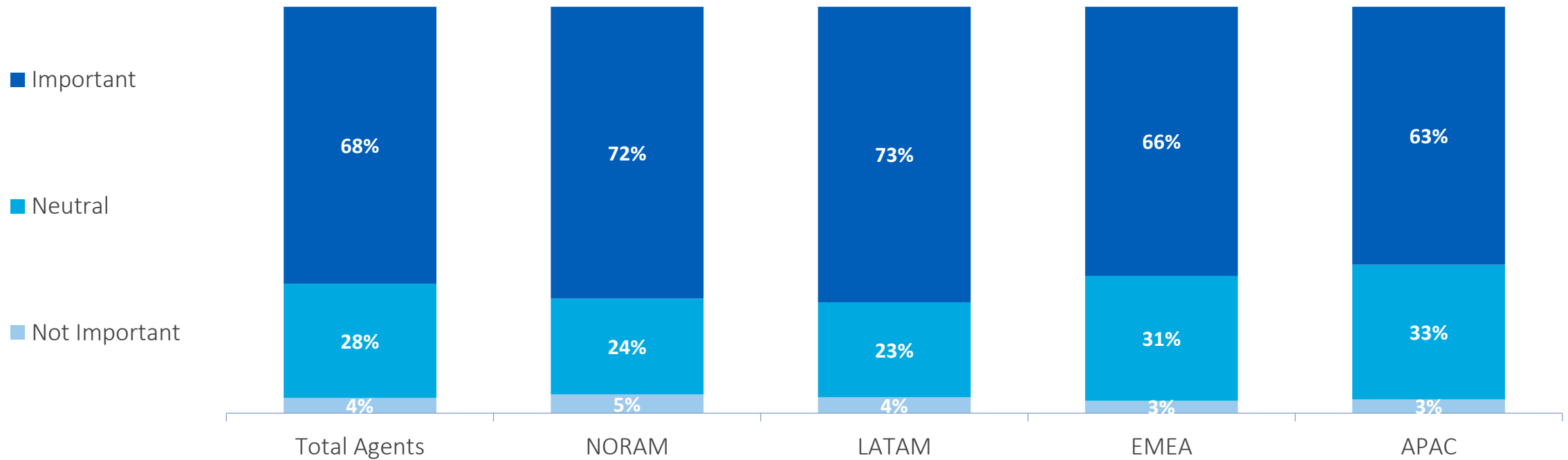
9%

Hotel name, Code

Q: What keywords would help drive you to book a hotel based on advertising?

Including icons in ads has become best practice

Seven in ten agents state it's important for the icons to include "free" or "complimentary"



Q: When searching for a hotel property, how important is it that the icons detailing the amenities offered include the word "free" or "complimentary" if in fact the amenity is free (i.e., free Wi-Fi, complimentary breakfast)? (7-point scale: Very important, Neutral, Not very important)

What does a great offer look like?



HOTEL

\$25 US DINING CREDIT
IN THE HEART OF HOLLYWOOD
\$250/NIGHT. FREE PARKING.

XX0012345

FREE   

LEARN MORE

Key takeaways

- **Think GDS as travel agent metasearch:** Optimizing your HOD and advertising strategy on this channel makes it easier for agents to find and book your hotel.
- **Agents want high-quality offers in real time:** Agents like to sell to hotels that make them look good.
- **They aren't just shopping rates, they're shopping inclusions:** Offer something that your competitors don't, and make it specific to certain checkout dates
- **Content integrity:** Make sure your amenities and hotel descriptions are the same across all GDSs and channels!

