

Press Release

Major new global study reveals hotel of the future and the ever-changing face of the hotel guest

- *Commissioned by Amadeus, 'Hotels 2020: Beyond Segmentation' reveals the spectrum of choices and preferences of future guests and what this means for hotels in an era of extreme personalisation and global change*
- *Launch of Amadeus Hotel Platform to drive business transformation by giving hotel chains the tools to build brand value, modernise operations, increase revenues and reduce costs*

Madrid, Spain, 10 November 2010: A major new report, **'Hotels 2020: Beyond Segmentation'** (<http://www.amadeus.com/hotelit/beyond-segmentation.html>), reveals the emerging behaviours and demands of the future hotel guest and what this means for the types of hotels we will see in the future.

Published today, the report looks forward to a time where augmented reality, responsive guest environments and robots may become commonplace as guests demand greater personalisation, increased comfort and more innovative experiences. At the same time the report also highlights the new hotel models that may emerge including invitation-only hotels, hotels co-branded with luxury brands, white-label hotels and 'catch-all' hotel chains that will deliver 1-star budget hotels through to six-star luxury properties.

The report was developed by Fast Future Research, an independent futures research and consultancy firm, and commissioned by Amadeus, a leading travel technology partner and transaction processor for the global travel and tourism industry.

Key findings

1. Guests will be able to tailor every aspect of their hotel experience

Traditional customer segmentation is likely to die and will instead be replaced by personalised service spectrums and a 'total service model'. This will mean that the guest of the future will be able to tailor every aspect of their experience including technology, hotel services, the bedroom, the journey, pricing and communications. Over two thirds of survey respondents agreed that by 2020 traveler motivations will become increasingly

fragmented and diverse and harder to segment into clearly definable customer groupings.

2. The hotel of the future will be more personal, connected and responsive

With changing guest requirements it is likely we will start to see hotels that cater for multiple needs and demands. We will start to see innovations such as intelligent furniture, personalised nutrition and responsive technologies that understand cognitive functions. More than nine out of ten people questioned felt that by 2020 hotel guests will expect their stay to be personalised around a set of choices they make at the time of booking or prior to arrival.

3. Horizon scanning, anticipation and rapid implementation will become some of the hallmarks of successful hotel groups

The report details the characteristics of successful hotel chains of the future including the ability to spot opportunities and dangers, develop effective strategies and implement change programmes quickly. The report highlights the central role of technology systems in helping hotel groups stay ahead and meet the needs of tomorrow's guest.

Jérôme Destors, Director, Hotel IT says: "Only by looking at the global drivers and forces of change can we begin to understand the future hotel guest and what this means for hotel chains. Whilst not definitive, in this report we have been able to build a compelling picture about the hotel of the future and what the changing preferences of the guest means for the guest experience in the next ten years. Critical to meeting the needs of future guests will be intelligent and responsive technology systems that can support the evolution of hotels and we are committed to helping our customers remove technology barriers so that they can transform their business and make the most of emerging opportunities."

Rohit Talwar, Chief Executive of Fast Future Research says: "What we see is a shift from neatly defined customer segments to a more fragmented set of service spectrums that will demand hotels act in a way that is guest-focused personal, connected and informed. The right technology will be an increasingly important weapon in delivering on guest expectations and securing brand differentiation."

To coincide with the launch of the report, Amadeus, a leading travel technology partner and transaction processor for the global travel and tourism industry, announces the launch of Amadeus Hotel Platform, a centralised above-property solution that will

transform the way hotels do business. Built around one comprehensive database, and available as a Software as a Service model (SaaS) it combines central reservation, property management and global distribution systems into one fully integrated platform. Offering a single and real-time view of the entire business, Amadeus Hotel Platform allows hoteliers to deliver innovative and new guest services, generate additional revenues and also quickly react to market changes as new trends, behaviours and demands emerge.

The study contains both quantitative and qualitative data and draws on desk research, expert interviews and a global survey on future strategies and business models for the sector. The survey was conducted with 600 respondents from around the world, of whom 42 per cent work in the travel industry.

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Notes to the editors

Amadeus is a leading transaction processor and provider of advanced technology solutions for the global travel and tourism industry.

Customer groups include **travel providers** (e.g airlines, hotels, rail, ferries, etc.), **travel sellers** (travel agencies and websites), and **travel buyers** (corporations and individual travellers).

The group operates a **transaction-based business model** and processed more than 670 million billable travel transactions in 2009.

Amadeus has central sites in Madrid (corporate headquarters and marketing), Nice (development) and Erding (Operations – data processing centre) and regional offices in Miami, Buenos Aires, Bangkok and Dubai. At a market level, Amadeus maintains customer operations through 72 local Amadeus Commercial Organisations covering 195 countries.

Amadeus is listed on the Madrid, Barcelona, Bilbao and Valencia stock exchanges and trades under the symbol “AMS.MC”. For the year ended 31 December 2009, the company reported revenues of EUR 2,461 million and EBITDA of EUR 894 million. The Amadeus group employs over 10,100 employees worldwide, with 123 nationalities represented at the central offices.

To find out more about Amadeus please go to www.amadeus.com.

To visit the Amadeus Investor Relations centre please go to www.investors.amadeus.com.

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