



*Amadeus North America
Travel Agent Survey Results*

**“Seizing Opportunity
In The Upturn:
Will Emerging Trends
Boost Your Business?”**

March 2010

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BOSTON • NEW YORK • WASHINGTON D.C.
TORONTO • CHICAGO • LOS ANGELES

The Survey

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Focus

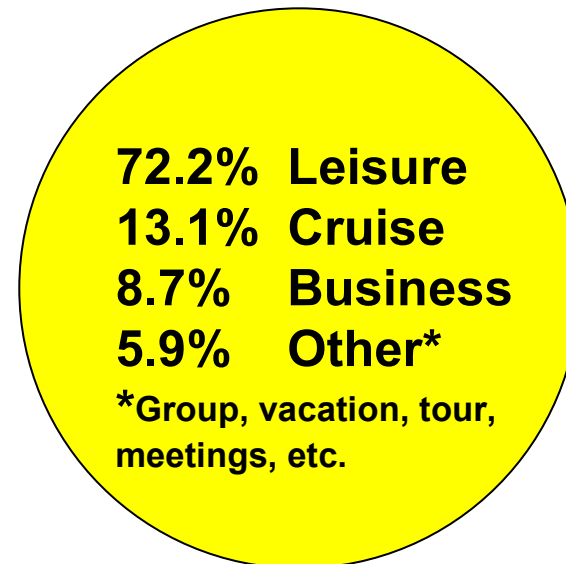
- ▶ This survey benchmarks the outlook of North American travel professionals about the future of the travel business and the impact of three important trends poised to reshape travel in a post-recessionary world.

Methodology

- ▶ 16-question online survey of North American travel agents
- ▶ Conducted February 12-19, 2010

786 Responses

- ▶ 41.3% agency owners/managers
- ▶ 26% retail agents
- ▶ 23.6% home-based agents
- ▶ 9.3% independent consultants

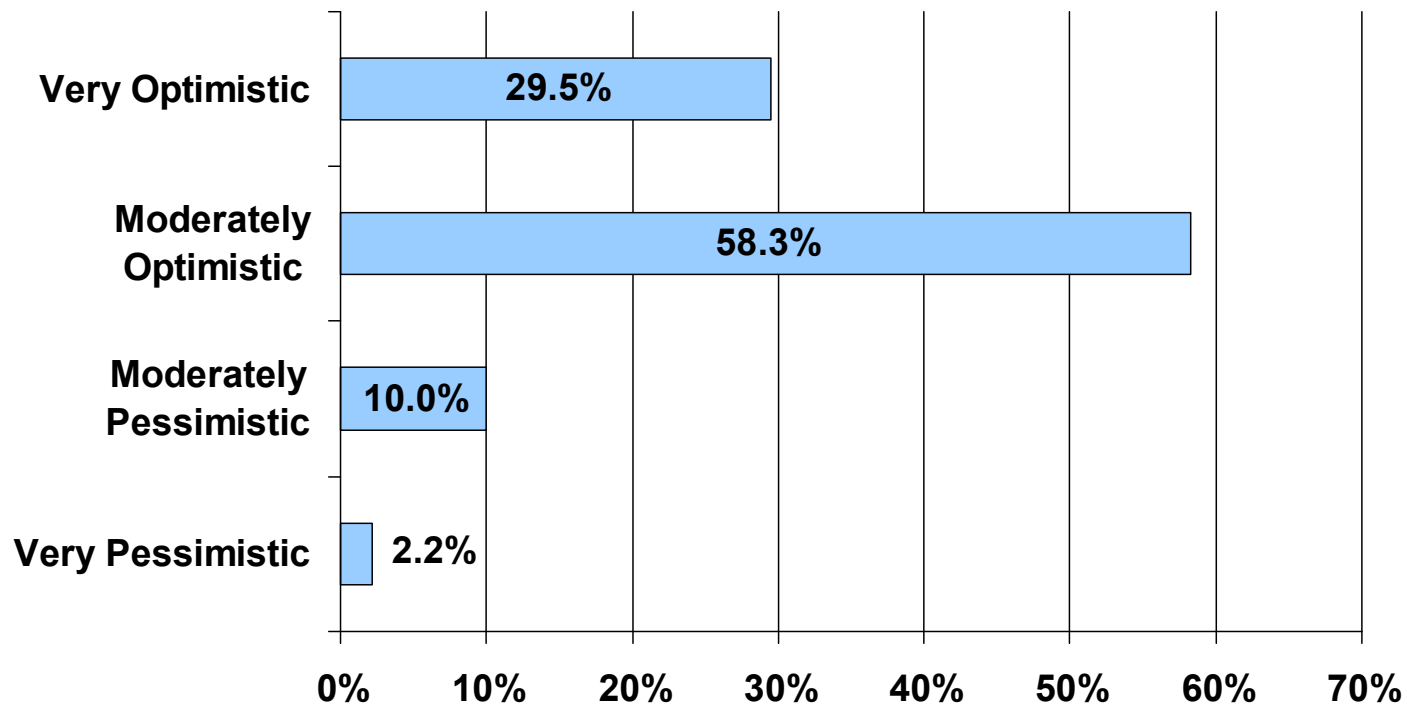


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Confidence is high for business...



“How optimistic are you about your own business in 2010?”



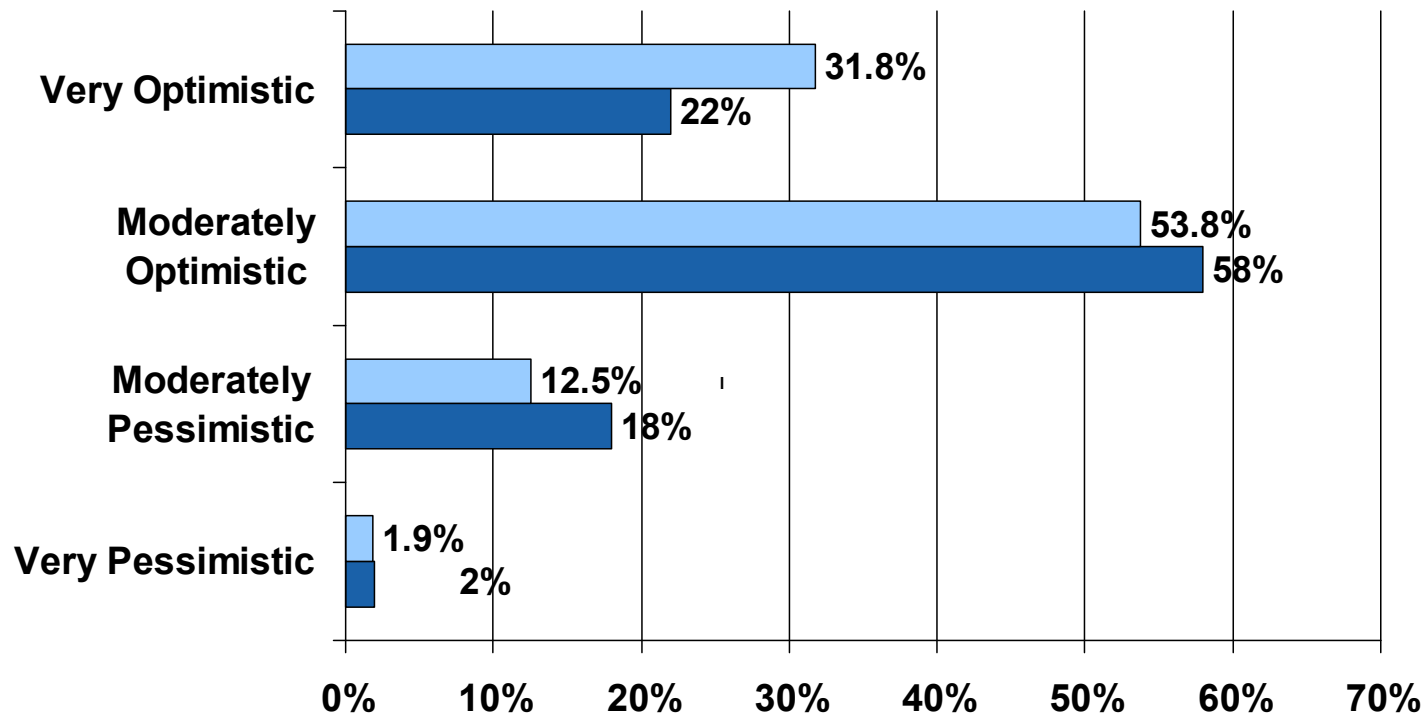
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...and for the travel industry.

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“Overall, how optimistic are you about the future growth of the travel industry?”



North America Global*

□ □

*Results from “The Amateur-Expert Traveller” (November 2009), an Amadeus report that surveyed a cross-section of travel professionals worldwide about industry issues and trends.

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It's about the trip experience.



“How important to amateur-expert travelers are each of the following?”

Very Important

Pick right destination	84.9%
Pay right price	83%
Personal safety	72.5%
Suitable lodging	67.7%
Secure personal data	67.5%
Credibility of supplier	65.9%
Time/date of travel	38.8%
Departure airport	38.5%
Traveling “green”	9.2%

Somewhat Important

Departure airport	59.9%
Time/date of travel	59%
Traveling “green”	51%
Suitable lodging	31.6%
Credibility of supplier	28.3%
Secure personal data	27.5%
Personal safety	24.7%
Pay right price	16.8%
Pick right destination	14.1%

Not Important

Traveling “green”	33.8%
Departure airport	5.3%
Credibility of supplier	4.5%
Secure personal data	3.5%
Time/date of travel	1.7%
Personal safety	2.2%
Pick right destination	0.8%
Suitable lodging	0.4%
Pay the right price	0.1%

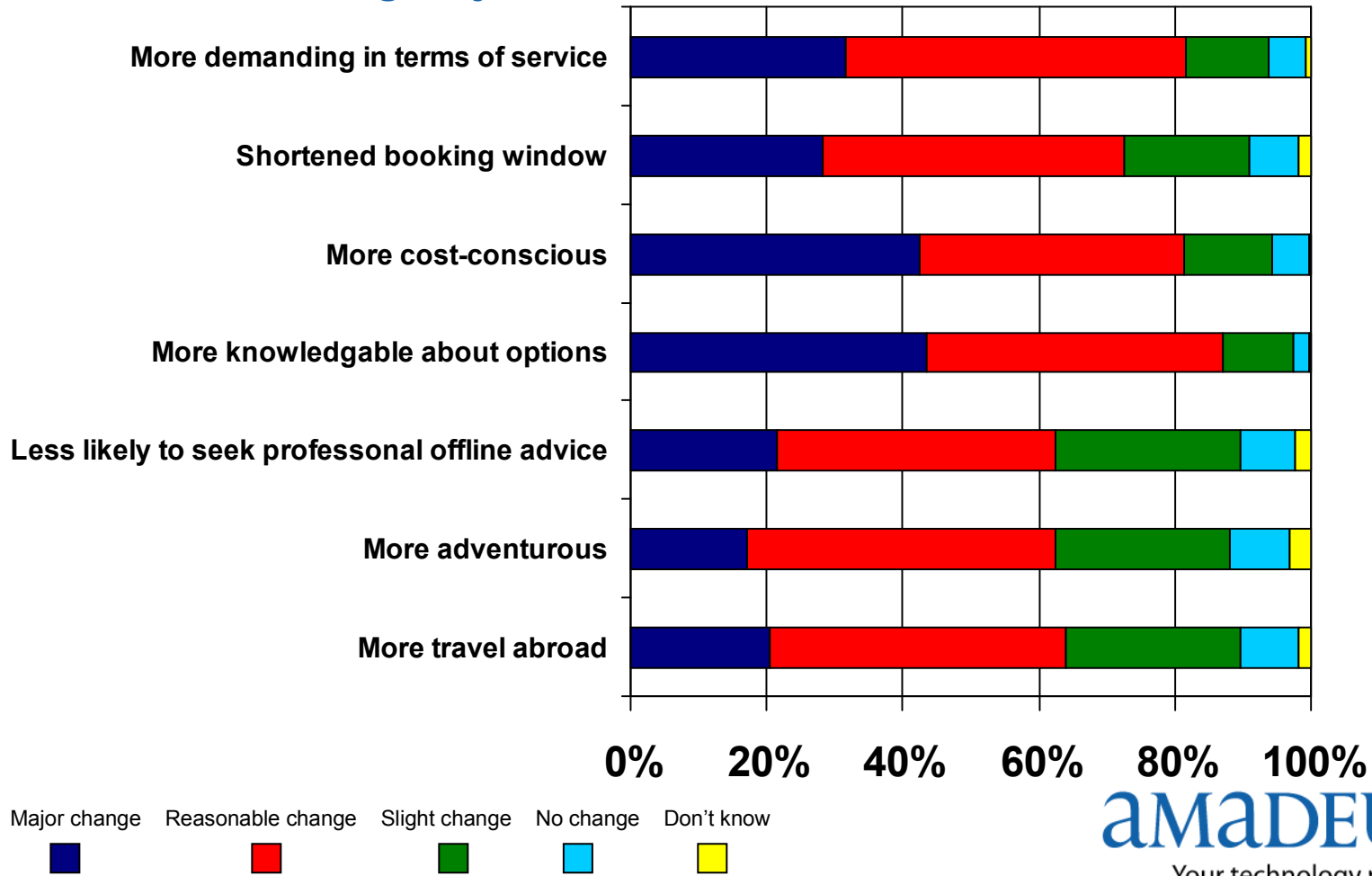


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Better-informed bargain hunters.



“How will traveler behavior change over the next 10 years in each of the following ways?”



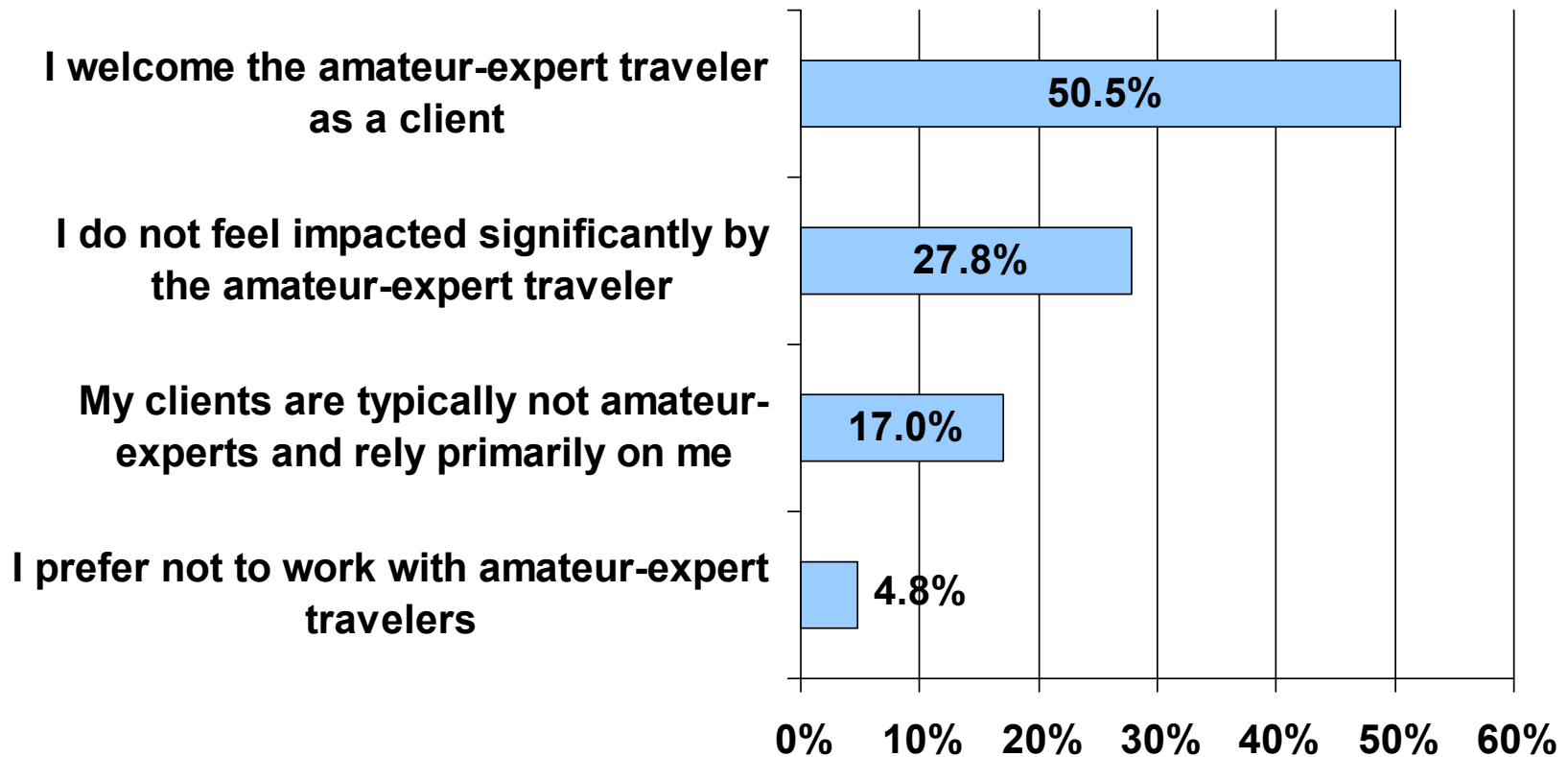
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Rolling out the welcome mat.



“When it comes to your business, how do you feel about the amateur-expert traveler?”



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Amateur-experts – just saying.

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- ▶ “It's refreshing to have clients who have tried to educate themselves about their destination and travel options - many also find in their research that they don't really want to do ALL the work entailed to put together a really good travel experience.”
- ▶ “I have clients that have tried to do everything online, but have returned to our agency after not getting the service they needed.”
- ▶ “When the traveler knows more of what they want then the questions they ask are more specific, and, in the end, it takes me less time to get what they want.”
- ▶ “Most times they are just trying to get free information from us so they can go online and finish their booking themselves.”
- ▶ “All of these trends are cyclical - when 20-30 they are free to investigate - as they age they demand more from us in service as opposed to price - has been this way for 27 years.”
- ▶ “I like to learn from my clients as well as have them learn from me.”
- ▶ “A well-informed client saves me time.”

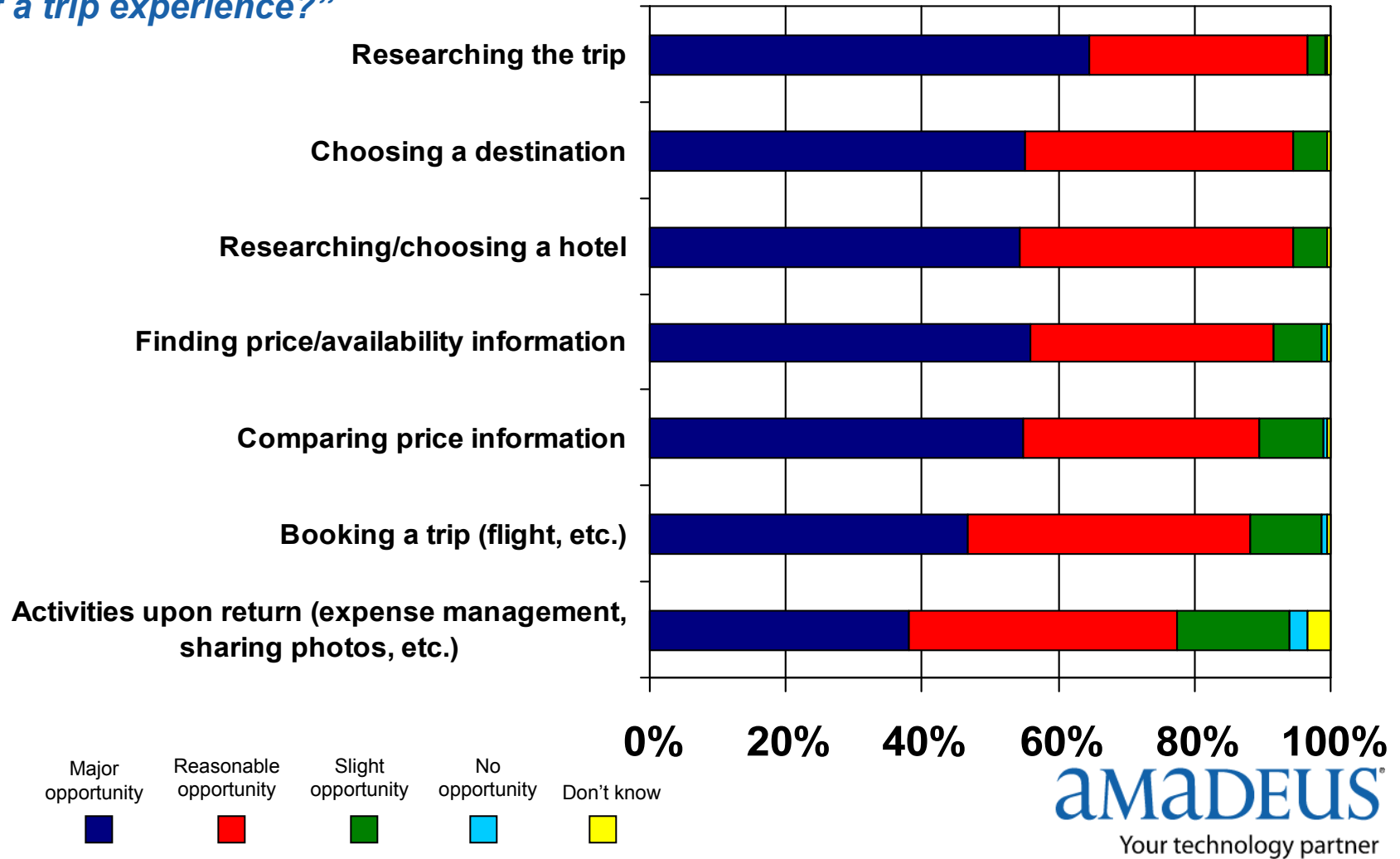
Sample of write-in comments from survey respondents

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Just beginning to feel tech's impact.



“What opportunity does technology have to improve the following elements of a trip experience?”



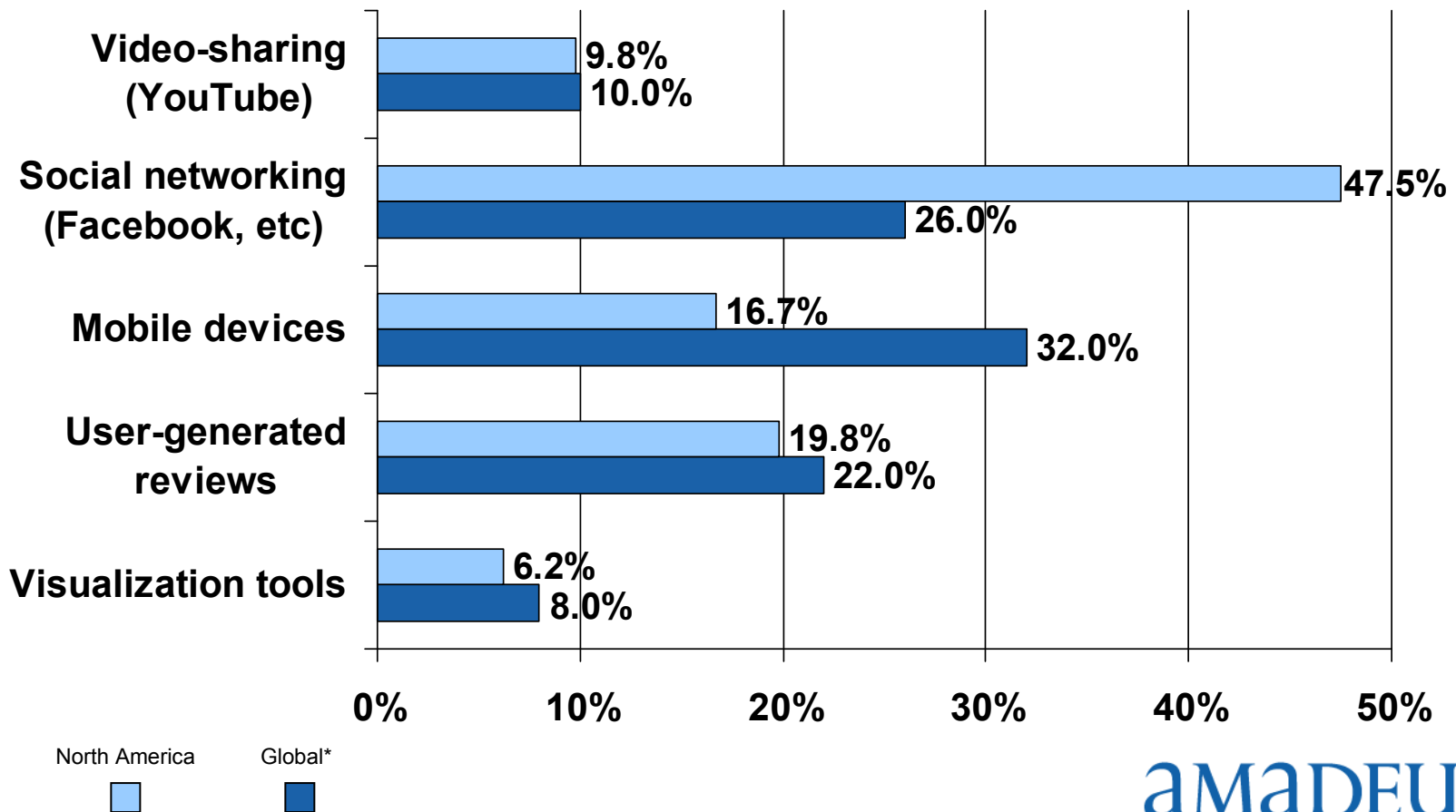
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Friend me.

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“Which will have the greatest impact on the way the next generation researches and books travel?”



North America Global*

□ □

*Results from “The Amateur-Expert Traveller” (November 2009), an Amadeus report that surveyed a cross-section of travel professionals worldwide about industry issues and trends.

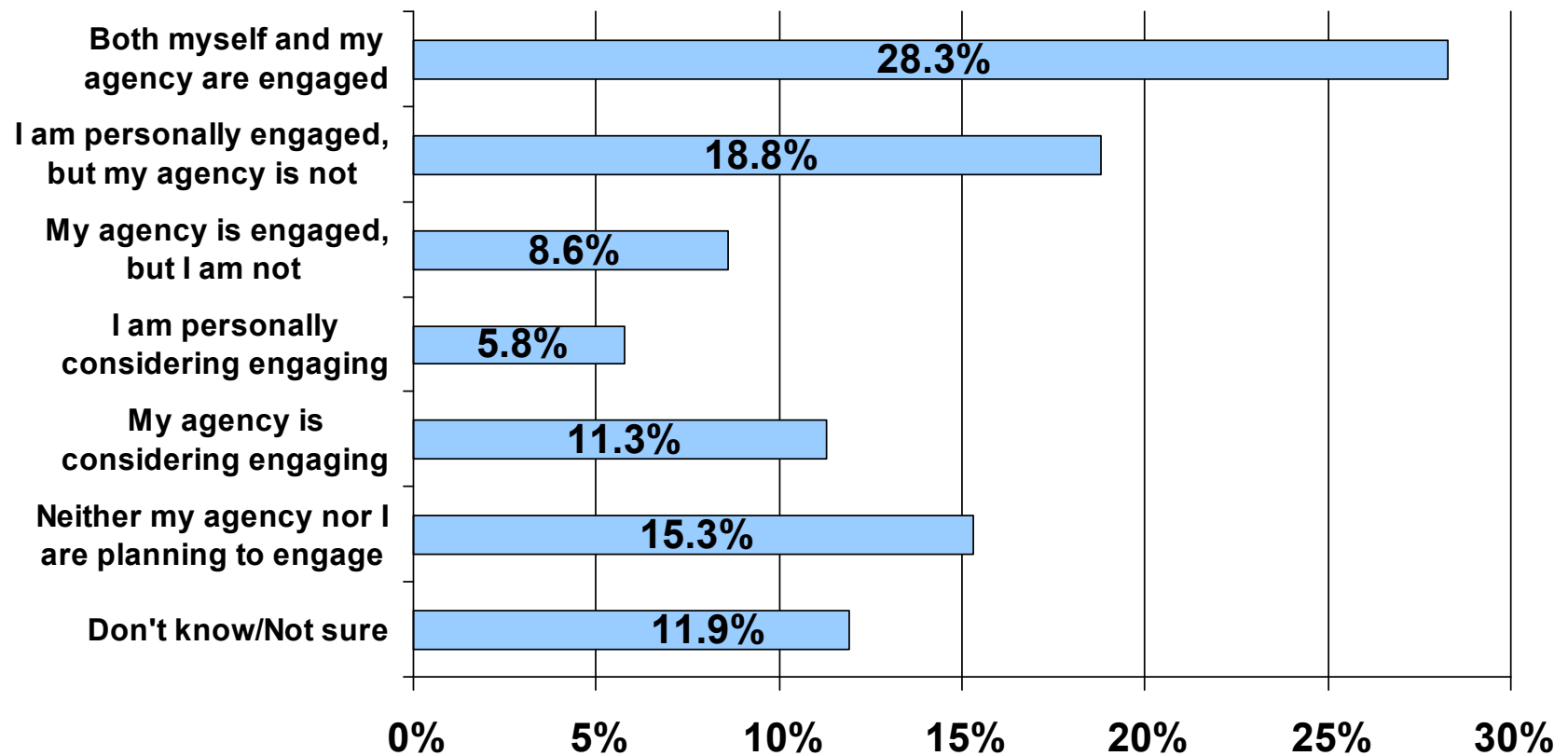
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Travel gets social.



“Are you and/or your agency currently engaged in social media activities?”



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Social media – just saying.

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- ▶ “All of the social media activities are valuable; however, everyone has different skill levels in each, and what suits one person may or may not suit another.”
- ▶ “I think social media will present ideas to travelers, but I think they will still book through a trusted advisor.”
- ▶ “You can only get as much out as you put in when it comes to technological trends.”
- ▶ “Our Facebook page is the best free promotion we have ever had, by far.”
- ▶ “I don’t really want to engage in social media; however, it may be necessary.”
- ▶ “[Social media is] still in its infancy, but real-time reviews of travel via Facebook, blogs, etc., are growing.”
- ▶ “I don’t really want to engage in social media; however, it may be necessary.”
- ▶ “E-mail is about the only consistent usage – Twitter, etc., are fads and clients will eventually pull away from them. “
- ▶ “There is just so much we can do. I don't see all of this really helping me.”

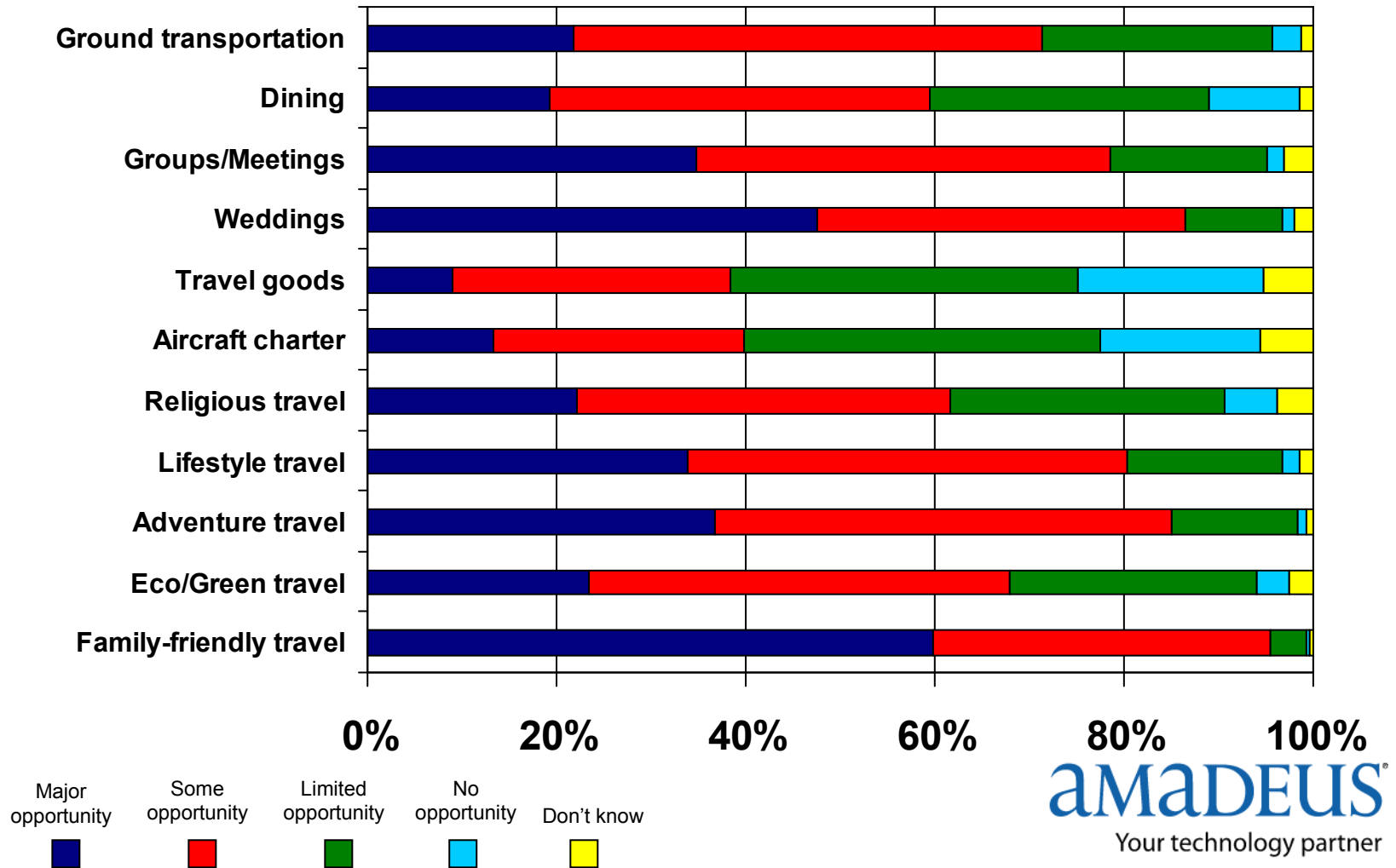
Sample of write-in comments from survey respondents

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Family Fun is Hot, Travel Goods Not.

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“How would you rate the business opportunity in the following areas?”

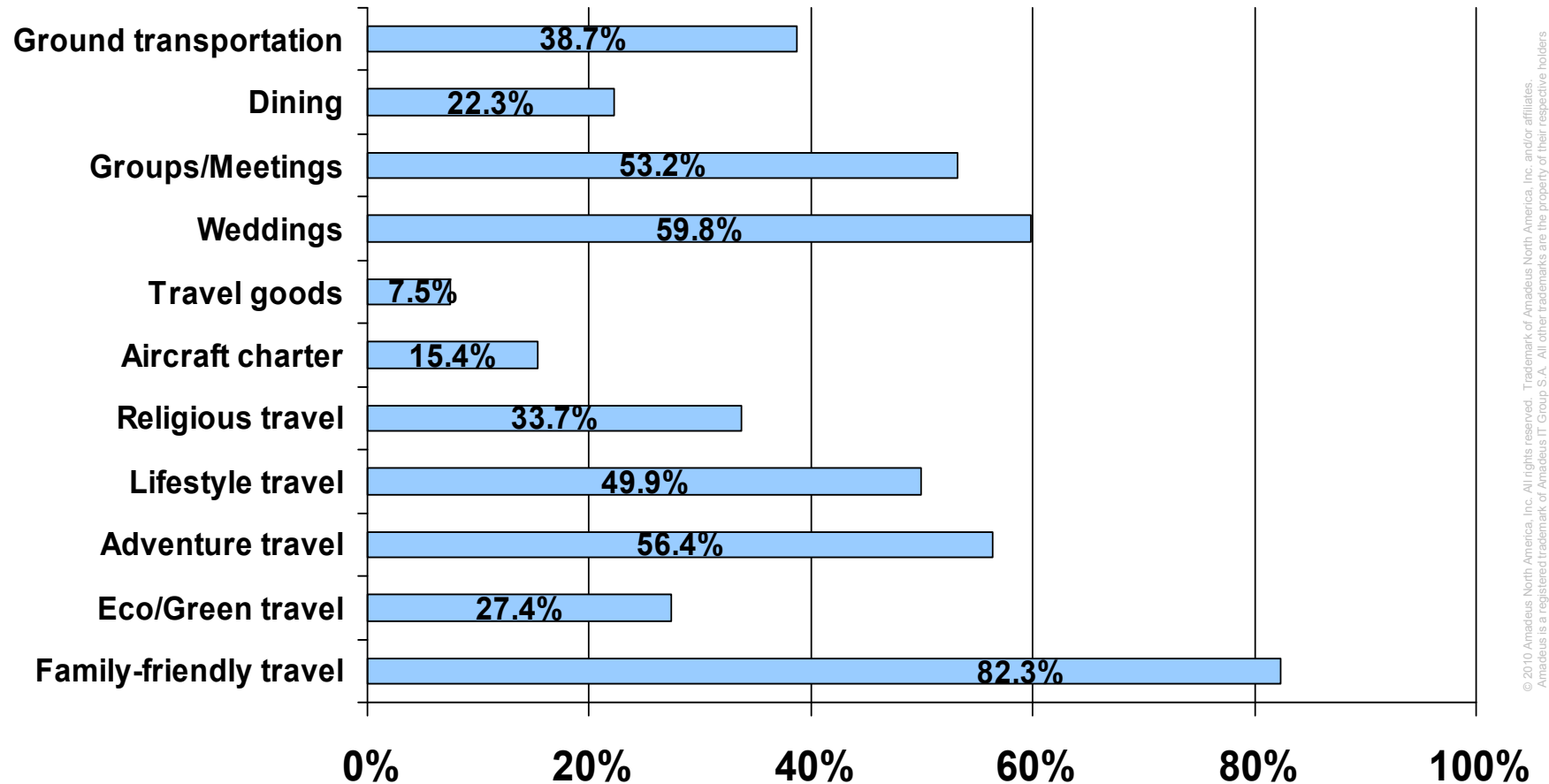


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The kids will love it there.

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“Which of the following niche travel areas do you/your agency currently pursue or intend to pursue?”



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Niche business – just saying.

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- ▶ “Again, this is where an experienced, seasoned travel professional will actually gain clients, because specialty travel requires value interpretation.”
- ▶ “Focusing on a few trends is key ... too many spreads you too thin.”
- ▶ “Niche travel is where social media can aid a traveler. They can find like-minded people and get current information on options for their interest.”
- ▶ “I feel that every agent needs to find their own niche and make it the best that they can.”
- ▶ “I have always been a generalist and doubt I could make a living from any niche unless I embarked on a major marketing campaign.”
- ▶ “Many families are getting together and scheduling vacations, more so than before when they went their own ways.”
- ▶ “Niche travel is a very good way to market yourself...wedding specialist, individual resort specialist, cruise specialist, etc.”
- ▶ “The niche market has been good for my business and should continue to be an excellent source of business.”

Sample of write-in comments from survey respondents

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Today, agents...

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- ▶ Have a **confident outlook** about their business and the industry.
- ▶ Are **focused on fundamentals** – the right trip at the right price for the right customer.
- ▶ **Welcome** amateur-expert travelers (mostly).
- ▶ Expect **technology** to continue **improving** the travel process.
- ▶ **Embrace social** media.
- ▶ Recognize the **value of niches**.

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About Amadeus

Amadeus is the chosen technology partner and transaction processor for the global travel and tourism industry. The company provides distribution and technology solutions to help its customers adapt, grow and succeed in the fast changing travel industry. Customer groups include travel providers (airlines, hotels, car rental companies, railway companies, ferry lines, cruise lines, insurance companies and tour operators), travel sellers (travel agencies) and travel buyers (corporations and travelers).

Amadeus operates under a transaction-based business model that offers IT solutions to virtually all players in the travel industry. The Amadeus system processed more than 670 million billable travel transactions in 2009.

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

The company is majority owned by AMADEUS IT HOLDING, S.A., whose shareholders are BC Partners, Cinven, Air France, Iberia and Lufthansa. The Amadeus group employs over 9,300 employees worldwide, with 123 nationalities represented at the central offices.

More information about Amadeus is available at: www.amadeus.com

Download Amadeus' Amateur-Expert Traveller report here:

www.amadeus.com/amateur-expert

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