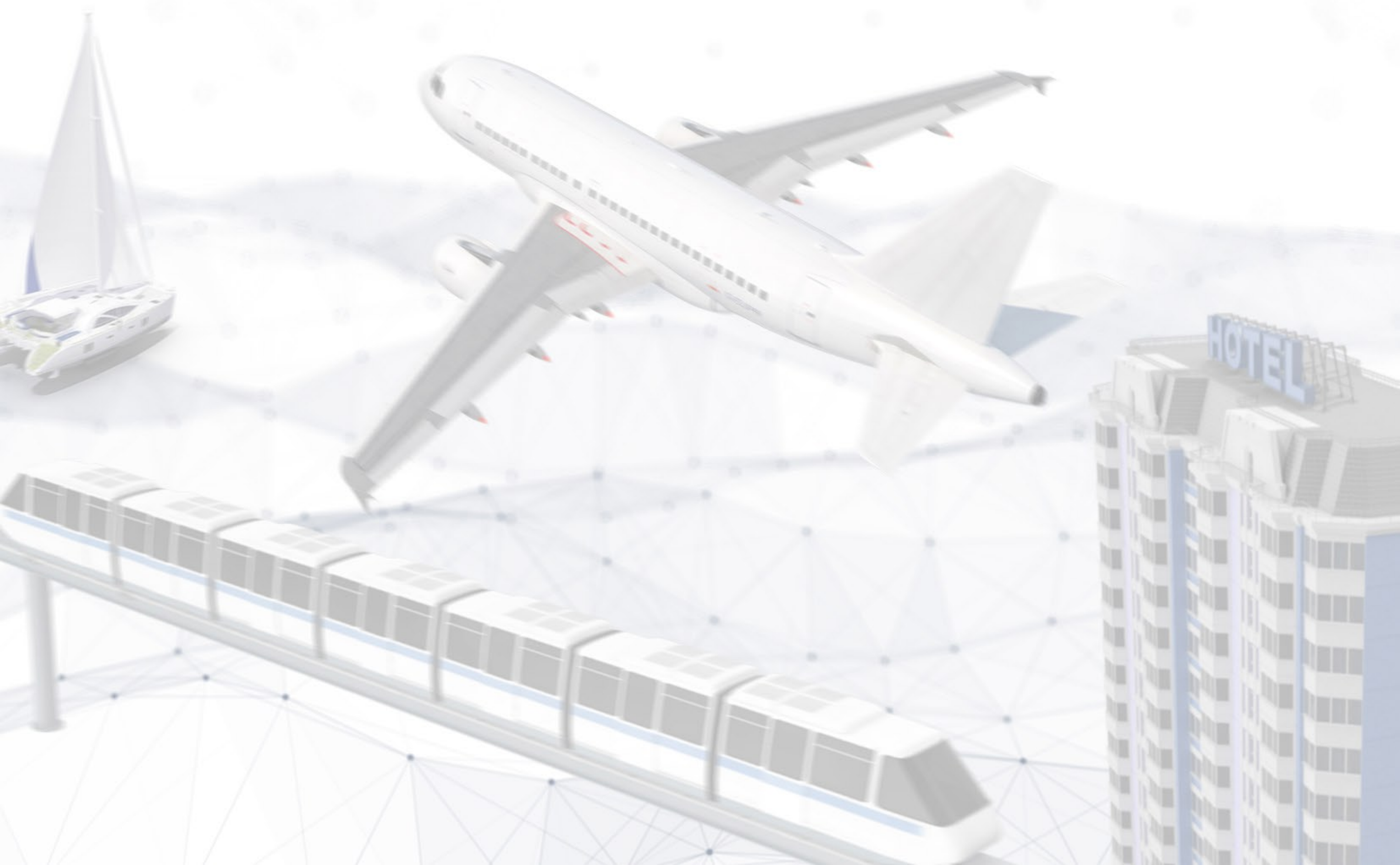


```
function use_unique...
= 0; c < a.length; c++) {
return c; } function use_unique...
= b.length - 1; return c; } return b.length...
ray(a[c], b) && b.push(a[c]); } return b.length...
ged").val(), b = b.replace(/(\r\n|\n|\r)/gm, " ");
inp_array = b.split(" "); input_sum = inp_array.l...
length; a++) {
0 == use_array(inp_array[a], c) &&
b[b.length - 1].use_class = use_array(b[b.length -...
sort(dynamicSort("use_class")); a.reverse(); b...
= indexOf_keyword( void 0); -1 < b && a.splice(
return a; } f...
{ for (var c =...
{ for (var c = -1...
c; } function d...
return(c[a]...
if (0 >= b.le...
= a.indexOf(b, f...
o-button").click...
parseInt(h().un...
ate_slider(); f...
parseInt($("#lin...
" + d); functio...
var n = [], d = d...
&& b.splice(e, 1);
```



FROM THEN TO NOW

THE EVOLUTION OF THE TRAVEL INDUSTRY OVER THE PAST 14 YEARS



This document is examining the evolution of the travel industry during the last 14 plus years. Since 2002, a number of seismic shifts have taken place within the travel industry that have had a massive impact on how companies operate and travelers experience the world.

The major milestones in the travel industry's evolution will be discussed, from the perspective of the traveler/consumer, the industry's major players, and the technological advancements that have transformed the industry into a powerhouse of global commerce.

THE TRAVELERS' PERSPECTIVE

It's an understatement to say the world has changed drastically since 2002. At seemingly the same time, people become both more and less connected through advancements in technology and 24/7 access to information, goods, and services.

The world is simultaneously much larger and much smaller than it was just 14 years ago, and the way industries function in today's world bears little resemblance to global business climate of the year 2002.

And the travel industry is a prime example of this evolution. Technology and a greater emphasis on global commerce and connectivity have been core drivers in shaping the industry into what it is today. But even though the industry itself has come a long way since 2002, one could argue the most transformed aspect of the travel landscape is the traveler.

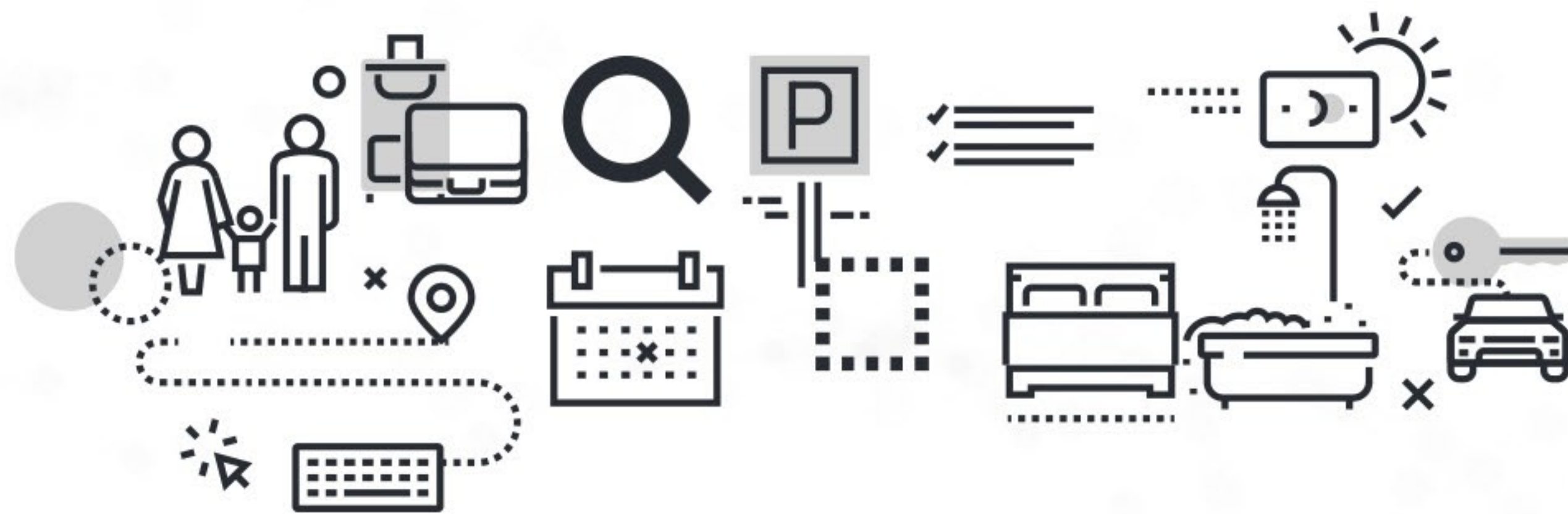
A traveler in 2016 is not only more informed, knowledgeable, and empowered, they also play a larger role in defining how travel companies manage their products, services, marketing, and customer relations.

Travelers in 2016 have a powerful voice in how travel companies operate as well as the tools necessary to make their voices heard.

The technology and mentality/buying behavior associated with the modern traveler are critical touchstones in the evolution of the travel industry, and each element has its own significance in tracing the recent history of the travel landscape as well as plotting its future.

Technology & tools at the traveler's disposal

You can't discuss the evolution of the traveler without looking at the tools at their disposal - and in this case, specifically the internet. The rise of this technology has perhaps been the most disruptive aspect of how the industry has developed since 2002, particularly in the ways it's shaped how travelers engage with the industry in general. From the early days of travel review websites to the today's surge in mobile technology, the internet - and the way travelers have utilized it - has given consumers greater power and leverage to effect real change in today's travel industry landscape.



Travel websites

Right around the year 2002 is when the industry experienced the advent of travel review websites like TripAdvisor which gave customers the ability to review hotels, destinations, and other bookings, as well as share information with other travelers across the globe about travel companies, tour operators, and other industry players. Websites like TripAdvisor also gave travelers the power to curate their own travel experiences without the help of a traditional travel agent or travel company.

Online travel bookings

Priceline. Expedia. Orbitz. While these online travel booking sites existed prior to the year 2002, their popularity soared with larger portions of the globe attaining reliable internet access. The emergence of these websites provided travelers with an insider's view in terms of how travel agents used to plan and package bookings. This insight gave travelers the confidence and platform to research and purchase their own travel bookings with greater speed, ease, and convenience. In addition, the rise of online travel booking sites created higher expectations in the minds of travelers as they grew accustomed to have a variety of options and price points with the click of a mouse. Today, online travel bookings have shifted yet again from the Pricelines or Expedias to a more peer-to-peer marketplace model like AirBnB where travelers arrange their own accommodations with other travelers, determine their own pricing, and define their own availability and benchmarks for success and growth.

Social media

Though somewhat recent evolutions in the travel industry, social media platforms like Facebook, Twitter, and Instagram are direct descendants of those original travel review websites like TripAdvisor.

Travelers can not only connect with other travelers by sharing information, videos, and pictures about their travel experiences, but they can also communicate directly with travel agents, travel companies, tour operators, and more via social media accounts. In addition, the rise of messaging apps on the sites has recently provided travelers with a direct, real-time line of communication between both other travelers and travel companies themselves.

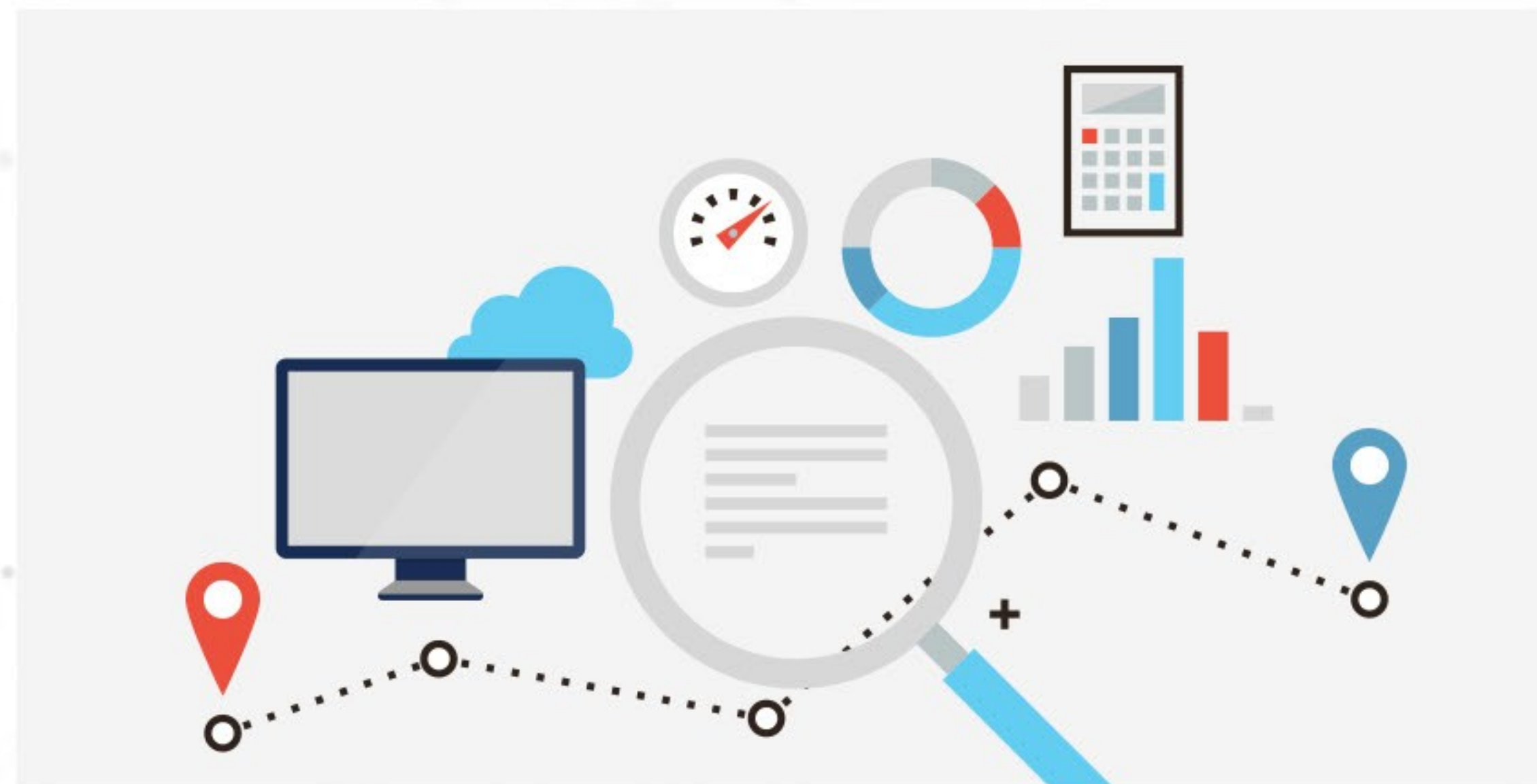
Mobile

The latest disruptive element in the technological evolution of the traveler, mobile capability has redefined how and more specifically when travelers research, book, and review travel bookings. Mobile apps and 24/7 connectivity make it easier than ever for travelers to interact with the industry, which means customers have adopted an I want it now mentality. This shift in behavior has not only impacted what travelers expect from travel companies, but it's also raised expectations in terms of the time investment customers feel is appropriate in researching and booking a trip. Mobile technology has also greatly impacted how travelers share information with other travelers because much of this sharing is done in real-time as the travel experience unfolds.

Mentality & Buying Behavior

It would stand to reason the evolution of the tools available to today's traveler would also impact the mentality and buying behaviors of the modern customer. The internet, social media, and mobile technology have been so disruptive to the travel industry that today's traveler has experienced some significant shifts in how they view travel bookings and the ways in which they actually purchase their accommodations.

First, as briefly discussed earlier, the speed, ease, and convenience associated with the internet and mobile capabilities has created a real-time mentality where customers expect services and products to be available on a 24/7 basis anywhere in the world. Because today's travel consumer spends so much time on-the-go and connected via their smartphone or tablet, consumers expect travel companies to meet them where they live - online - and engage with them across various platforms, whether that means travel review websites, social media, or even messaging apps.



Secondly, the ability to access travel research, information, and bookings at any time with the technology in their pocket has allowed travelers to be both more leisurely and impulsive in how they complete bookings. Research indicates today's traveler conducts hours upon hours of research before actually making a booking. As a result, travelers are less likely to engage with traditional travel agents or tour operators in completing bookings because they can access the same information, products, and services at their own pace without feeling pressure to make a purchase. However, as with many millennials, adventure, or experimental travelers, the ability to make complex bookings on a phone or tablet has also resulted in consumers acting more impulsively and making bookings based on whims or seizing last-minute deals.



Both of these developments in the mentality and buying behavior of today's traveler highlights just how closely linked technology and human responses, and how the desire for speed and convenience with travel technology has driven consumers to prioritize this above other concerns.

However, one of the more interesting turns in buying behavior has been the recent emphasis on personalization and individualization. Perhaps as a reaction to the often faceless interactions travelers experience when researching and booking travel in today's digital landscape, customers are now seeking interaction, conversation, and help in curating their travel bookings, whether from traditional travel agents or OTAs. Instant messaging apps and other direct lines of communication are driving customers to seek travel experiences tailored to their personalities with the personalized touch that comes from working with another human being. It's a delicate balance and one consumers are beginning to rank as a top priority when researching and making travel bookings.

TRAVEL INDUSTRY'S MAJOR PLAYERS

The beginning of the 21st Century was without a doubt an influential moment in the travel industry. With the rise in popularity of the internet, global, electronic delivery of services, products, and operational functions were becoming more and more the norm. GDS companies, OTAs, and other online-based suppliers and retailers began launching more customer-oriented services such as price comparison interfaces, digital trip planning tools, and electronic tickets and documentation to streamline processes and create more efficient, agile value chains.

This radical transformation throughout the industry sparked a wave of innovation that is still impacting how travel companies operate in 2016. The rapid evolution and development also resulted in the creation and development of a number of key industry players whose influence and impact not only ushered in industry-wide changes but also continues to affect the way travelers travel and companies operate.

Who are these major industry players? What companies came of age during the last 14 years to emerge as core brands or companies in today's global travel industry? What made them such disruptive forces in the travel industry's evolution and development? To answer these questions, here are a handful of the major players in today's travel industry and what exactly made them so influential.



Widely regarded as the first true travel booking review and interaction website, TripAdvisor was founded in 2000 and was one of the first travel sites to rely completely on user-generated content.

For many industry analysts, TripAdvisor was also the first platform that gave travelers a voice - writing reviews of hotels, airlines, tours, and other bookings gave customers an outlet to express their concerns in a way where other travelers could connect, respond, and share related concerns. In today's world of social media, real-time messaging, and other ways travelers and travel companies interact, TripAdvisor is viewed as the first incarnation of 21st Century customer engagement and relations - the first wave in a movement that pushed travel companies to be more responsive and agile to the needs of the modern traveler.



Though the company underwent a rebranding in 2000 from Pegasus Systems to Pegasus solutions, the company has remained a critical technology provider for travel companies, OTAs, hotels, airlines, and more. Founded in 1989, the company has since worked to provide integrated product and service delivery technologies for more than 60,000 hotel properties worldwide, making it one of the industry's largest third-party provider of reservation services and platforms. Pegasus' Utell and Unirez reservations applications are used in more than 140 countries and helped power some of the industry's most robust online travel booking websites such as Orbitz and other major booking sites. Primarily a B2B provider, Pegasus services include central reservation systems, electronic distribution services, commission processing, and payment services.



Perhaps the most recent disruptive company in the travel and tourism industry, AirBnB was founded in 2008 and has ushered in a new wave of peer-to-peer travel bookings based on a user-generated marketplace. Originally conceived as corporate travel alternative to a saturated hotel market, the company now has more than 1.5 million listings, operates 34,000 cities, and has rentals in more than 190 countries.

What's made AirBnB such an impactful development in the travel industry is its reliance on travelers connecting with other travelers to offer and book accommodations for a processing fee without any help or support from traditional travel agencies or travel companies. Unlike the more conventional models of supply and demand - which is based on scalability of inventory - AirBnB scales by simply increasing the number of hosts in the hopes of finding travelers to connect them with. User reviews are the primary drivers in terms of the accommodations offered, which is perhaps in the most recent incarnation of the model started by TripAdvisor at the turn of the century.



Orbitz was founded in 2001 as one of the first large-scale online retailers for hotels and airlines. Though it has since been purchased by competitor Expedia, Orbitz leveraged the lowest online airfares from 2000 to 2001 and was the first online travel company to incorporate an unbiased flight matrix display, a development which many travel companies soon copied in an effort to offer enhanced customer service and optimal operational flexibility. In another forward-thinking move, Orbitz launched a proactive notification platform where travelers received automated alerts about flight delays, gate departure changes, and other modifications in bookings. This model not only provided increased agility and transparency for the company, but it also offered customers peace of mind in planning their trips. This real-time notification capability also helped spawn the communication and messaging apps travel companies use today to remain constant contact with travelers and customers.

amadeus

One of the leading providers of IT solutions for the global travel and tourism industry, Amadeus also functions as a key GDS provider for travel companies around the world. Amadeus provides search, pricing, booking, ticketing, and other processing services in real-time for suppliers and travel companies through its own advanced networking systems. In 2001, Amadeus operated more than 57,000 travel agency locations worldwide and maintained the highest level of productivity across the globe. In 2010, the company processed more than 850 million billable travel transactions for hotels, airlines, and more, making it a top-tier system for a number of travel agencies and travel management companies on a global scale.

5 BIG MOMENTS IN TRAVEL TECHNOLOGY

Think about the travel industry just 14 years ago: much of the transactions and operational methods relied heavily on Excel spreadsheets, manual data entry and storage, and hardcopies of documents and receipts. Travelers looking to complete bookings would consult brick-and-mortar travel agencies and tour operators used brochures, pamphlets, and other physical materials to market and position their services.

Fast forward to 2016, the entire industry - from travel company to tour operator to the customer - is almost entirely dependent on digital technology, mobile capability, and instant, real-time access to up-to-the-minute, accurate information about the status of bookings, products, and services. Because of these advancements, today's travel industry operates a more efficient, streamlined value chain where travel companies and customers have an equal voice in which products and services are presented and how suppliers position these products.

In order to understand how the travel industry made such giant leaps in its technology journey, here are 5 big moments in the evolution of travel technology during the last decade and a half.

Travel booking review & interaction websites

The year 2000 saw one of the most influential developments within the travel industry: the founding of TripAdvisor. Thanks to the rise, growth, and reach of the internet, TripAdvisor launched as the first true travel booking review and interaction website. As one of the first travel sites to rely completely on user-generated content, TripAdvisor was also the first platform that gave travelers a voice - writing reviews of hotels, airlines, tours, and other bookings gave customers an outlet to express their concerns in a way where other travelers could connect, respond, and share related concerns.

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Obviously, web-based solutions were perhaps the largest component in TripAdvisor getting off the ground, however, advanced search capabilities and integrated booking engines were also critical drivers in helping TripAdvisor succeed and spawn a number of similar or like-minded companies.

Web-based computing and communication channels

While the tragic events of 9/11 may seem like an odd element to the development of travel technology, the long-term impact of those events not only shaped how travelers travel but also the technologies deployed in getting customers from one destination to the other. Because of the need for instant, real-time access to information about flights, hotel availability, and tour cancellations or alterations in the days and weeks following September 11, travel companies were pushed to leverage powerful, web-based computing and communication channels to keep travelers informed and updated on travel conditions.

One could argue the desire for fast, simple communication of information and bookings is a precursor to instant messaging and in-app communication tools travel companies deploy today to manage customer relations and relay information.

Essentially, 9/11 encouraged the travel industry to use communication tools and searching and booking engines in more robust and efficient ways. This not only resulted in a more responsive, efficient industry across the board, but it also helped influence many of the app-based and mobile technologies travel companies and customers rely on today.

Mobile capability

Perhaps the most truly disruptive technological advancement in the travel industry, Apple's iPhone and iOS debuted in 2007 providing customers with the first glimpse of just how travelers could research, book, and review travel bookings from the palm of their hand. It may seem difficult to remember a time before apps, messaging, and social media platforms were simply a given, but prior to 2007 travelers had very little in the way of mobile capability.

Travel bookings were completed on desktop or laptop computers, which had a fundamental impact on customer buying behaviors - travelers were more apt to seek additional input from travel agents or tour operators, and they also were less inclined to impulse or in-the-moment purchases and bookings.

The debut of the iPhone also was the first step toward a host of technological advancements such as digital payment capabilities and the advent of the tablet, which gave customers more power and control in curating their travel experiences.

Peer-to-peer travel bookings & collaborate consumption

In 2008, one website ushered in a new wave of peer-to-peer travel bookings based on a user-generated marketplace. Originally conceived as corporate travel alternative to a saturated hotel market, AirBnB now has more than 1.5 million listings, operates 34,000 cities, and has rentals in more than 190 countries. What's made AirBnB such an impactful development in the travel industry is its reliance on travelers connecting with other travelers to offer and book accommodations for a processing fee without any help or support from traditional travel agencies or travel companies.

Unlike the more conventional models of supply and demand - which is based on scalability of inventory - AirBnB scales by simply increasing the number of hosts in the hopes of finding travelers to connect them with.

User reviews are the primary drivers in terms of the accommodations offered, which is perhaps in the most recent incarnation of the model started by TripAdvisor at the turn of the century.

Social media platforms

Though first launched several years prior, social media juggernaut Facebook reached 1 billion users in 2012, making it the most widely-used social media platform across the globe. Facebook provides both travelers and travel companies with direct lines of communication and sharing capabilities to discuss, recommend, and review travel bookings and destinations, all of which have become important elements of how customers experience travel.

But Facebook also helped usher in other social media platforms such as Instagram and Twitter, both of which have further connected travelers and travel companies. Since its early inception - some would argue TripAdvisor - social media has pushed travel companies to become more agile, responsive, and transparent in providing services and feedback to customers. Because social media is now so common across a wide variety of platforms, travel companies and customers can interact real-time on nearly a 24/7 basis, which has further pushed the industry to operate with greater ease and speed.

Given how far technology in the travel industry has come in such a short amount of time, it's difficult to predict what disruptive technology platforms are on the horizon. More powerful computing engines, quicker bookings engines, and enhanced communication lines are most certainly in the mid to long-term future of the travel industry, but it's still interesting to ponder what the next big innovation will be and how travel companies and customers will respond.





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