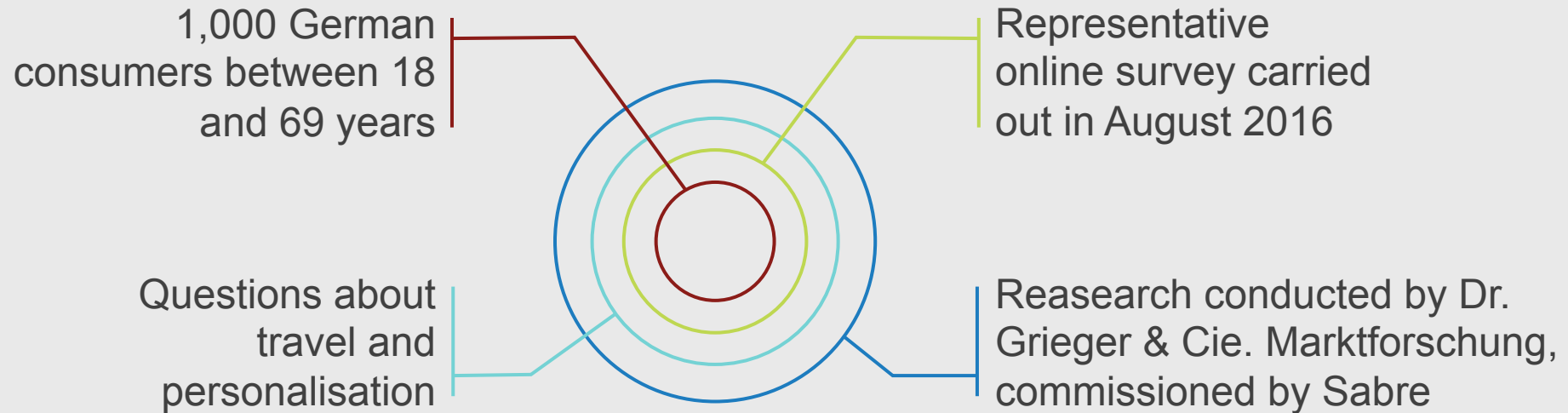


Personalisation & the German traveler

September 2016

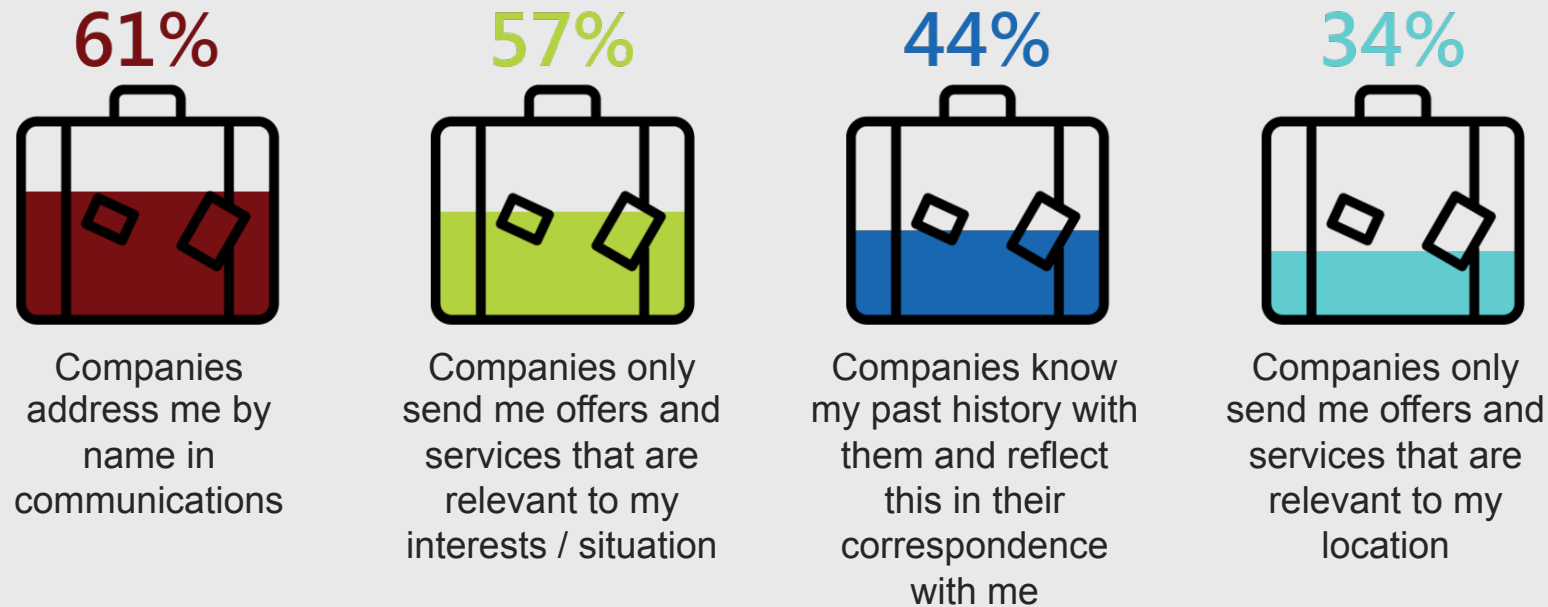


Methodology



Personalisation: different ideas

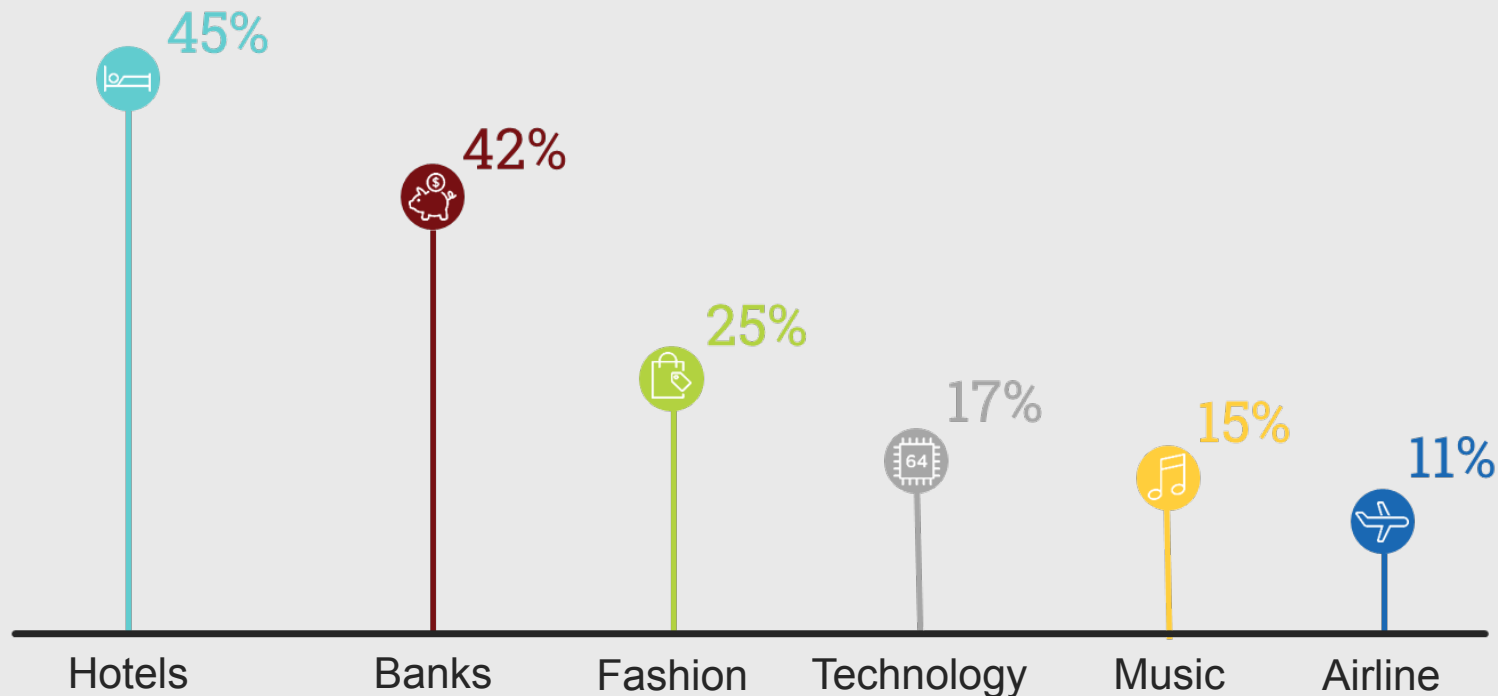
This is what German consumers say brands do to give them a more personalised service:



More than 60% of respondents associate personalisation with being addressed by name. Although personal communication is of course very important, this result indicates significant number of travelers has yet to be convinced of the advantages and possibilities of personalization.

Significant industry differences

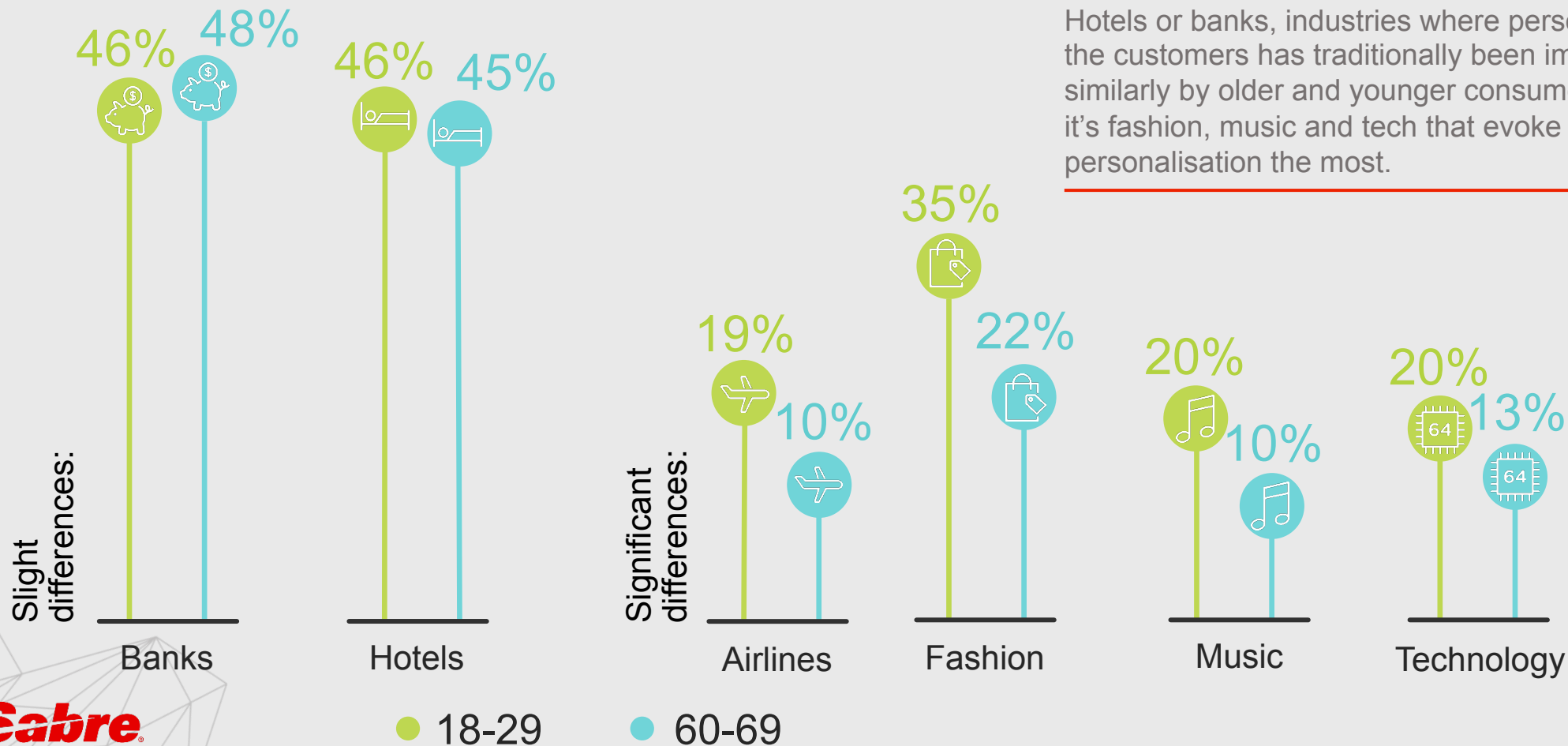
Some industries are more associated with personalisation than others:



Hotels are strongly associated with personalisation - probably due to intense personal contact between their staff and their guests. Despite the growing availability of ancillaries, aviation is seen as the least personalized industry. Airlines and travel distribution have the chance to improve this situation through effective personalization.

Differences in age groups

There are big differences in perceptions between age groups



Hotels or banks, industries where personal communication with the customers has traditionally been important, are seen similarly by older and younger consumers; For 18-29-year-olds, it's fashion, music and tech that evoke association with personalisation the most.

Personalization with air ancillaries

These are the most popular flight extras for German travelers:



More legroom



Reserved seat



Drinks



Checked baggage

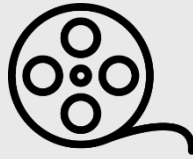


Food on board



WI-FI

Wi-Fi on board



Entertainment on board



Flexible rebooking

60% unique combinations

The high percentage of unique combinations suggests that effective personalisation can not be achieved through an extension of the standard offers as they can never meet the variety of demands and expectations of modern travelers.

Personalization through hotel extras

These are the most popular hotel extras for German travelers:



Breakfast
inclusive



Wi-Fi in the room



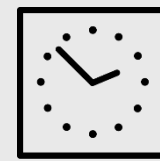
Parking at Hotel



Transfer from the
airport or train
station



Bottle of water in
the room



Late check-out

Personalisation and Privacy

Some people are willing to share details about themselves in return for a personalised service.



43% Yes / 48% No

I would be willing to share my location with my airline or a hotel if I would receive personalised service and relevant offers in return.



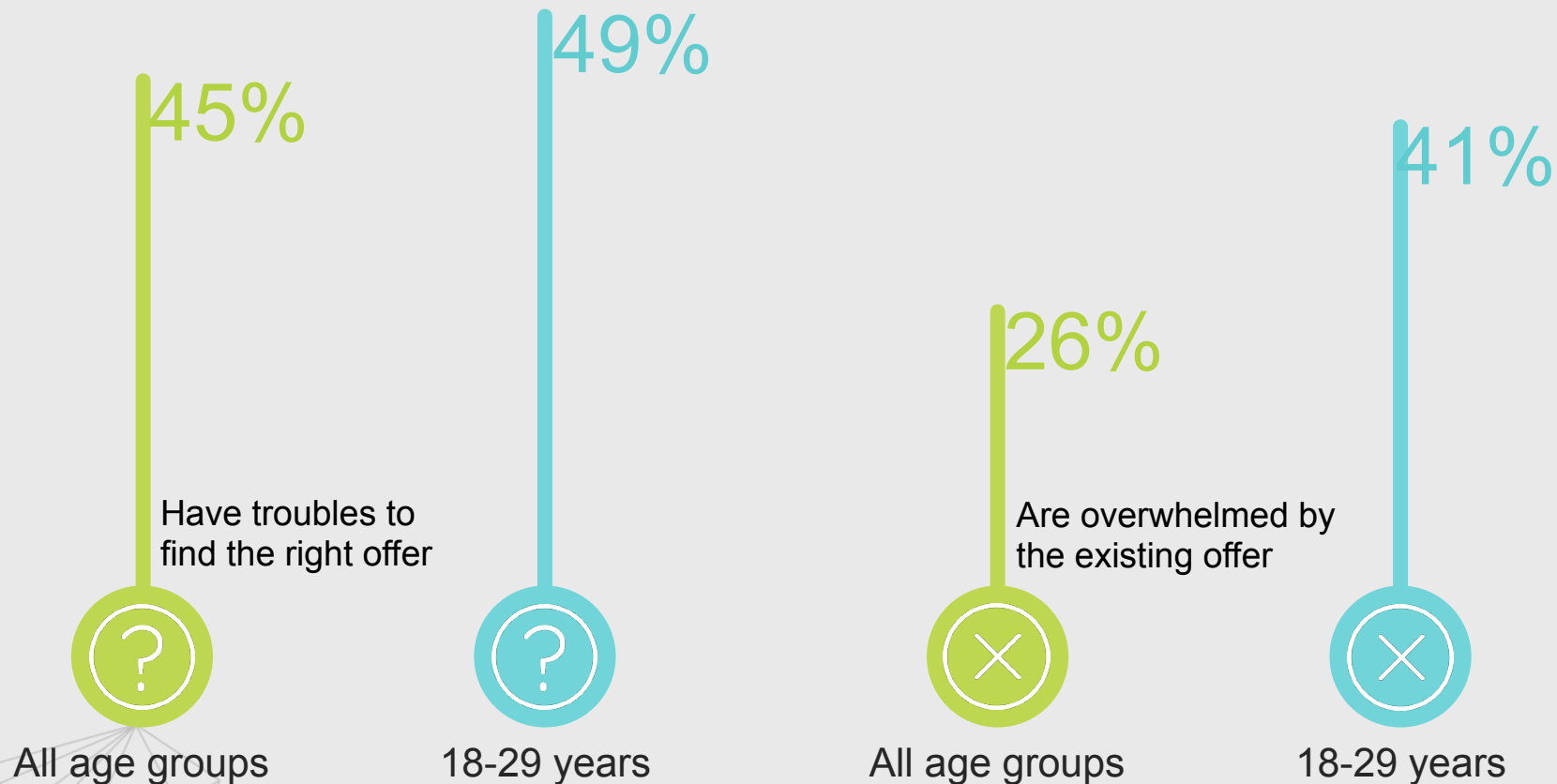
38% Yes / 38% No

I would be willing to share certain personal information (for example, date of birth, friends lists on Facebook) to obtain relevant and personal offers from my travel agent.

Although there is still a reluctance to share information, those that are willing create additional opportunities for the travel industry to meaningfully engage with them. The skepticism revealed by this research suggests that the added value of personalization has to be communicated better.

Uncertainty when booking travel

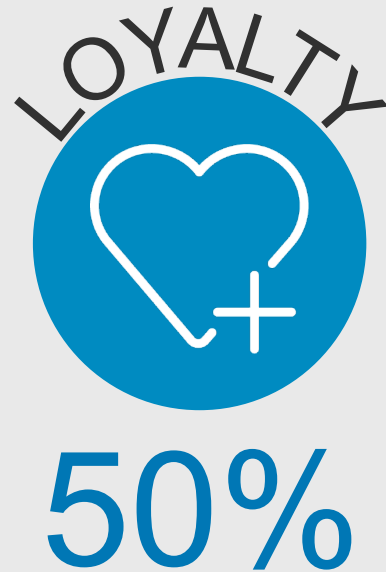
The large number of offers brings choice, but also uncertainty:



Many consumers find it difficult to find the right offer. Interestingly, this share was highest in the youngest interview group which can be considered to be most versed with the digital world. This indicates that personalisation must be better and more effective in order to help consumers navigate the extensive range of offers.

Customer loyalty and personalisation

Improved customer retention through personalised offers and services:



of travelers would be more loyal to a travel supplier if they were to receive personalized offers and services.

**PERSONALISATION =
LOYALTY**

Personalisation provides travel suppliers and travel agencies considerable opportunities to increase customer satisfaction and strengthen loyalty.
