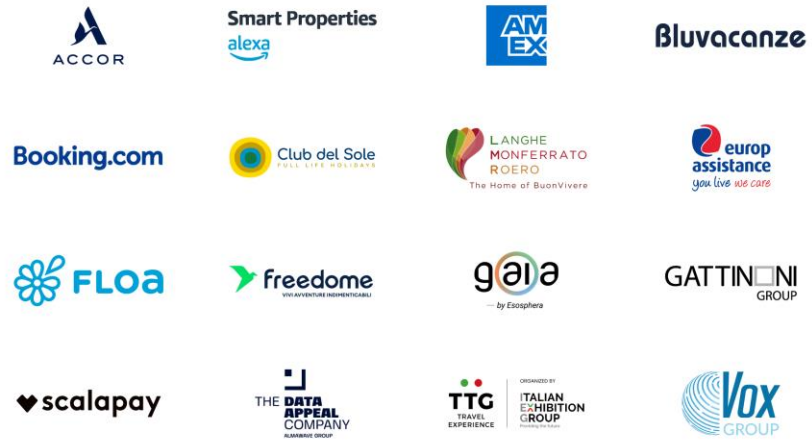


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13th June 2024

Travel Innovation Observatory

The Observatory activities and insights



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Travel Innovation and Business Travel
Observatories

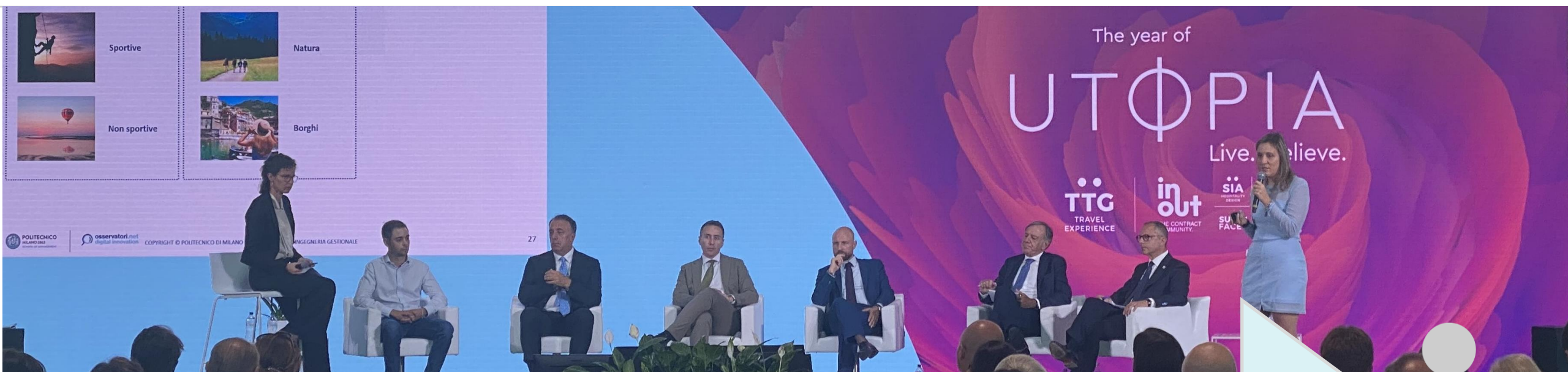
federica.russo@polimi.it



The activities of Travel Innovation and Business Travel Observatories



Some insights from market sizing and mobility research



10 Editions

of the Travel Innovation Observatory

- 10 public events at the **TTG** Travel Experience
- 6 **Travel Innovation Day** at Milan Politecnico



2014

2019

2023



10 years of history

96 companies and associations who supported the research

18 public events with **+13,000** registrations and **+7,000** participants

+40 reserved workshops and working tables with **+2,000** registr. and **+1,500** participants

30 interventions at external events (Convention, Academy, EC Workshops, ...)

+1,600 press releases since 2017

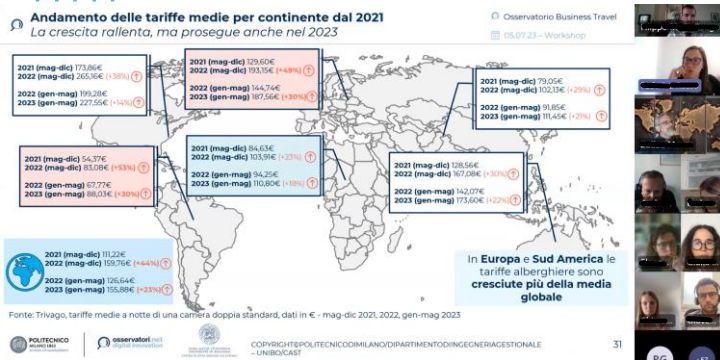
233 products published (reports, webinars, ...) with over **100,000** uses since 2020

+15,000 respondents to our surveys

+50,000 members of the Community (Travel agencies, Accommodation Facilities, DMOs, Travel Managers, ...)

The Observatory acts as a point of reference, in Italy and increasingly also in the European Union, for understanding the **opportunities** generated by **innovation in Travel** and **supporting** Companies, PA and Destinations and in **mastering the changes** taking place.

Research: updated data and innovative analyses



Analysis and research aimed at understanding **the current state and future prospects** of travel innovation

~ **1,400** operators interviewed
 > **400** startups censused
 ~ **2,000** travel managers in medium-large Italian companies involved

Qualified discussion and update



Opportunities for **discussion** and **collaboration** between the main players in the sector in a pre-competitive context. **In-depth** analysis and **dissemination** products (webinars, reports, ...)

> **250** workshop participants
 > **200** webinar users
 ~ **40** published products (reports, webinars, ...)

Effective communication

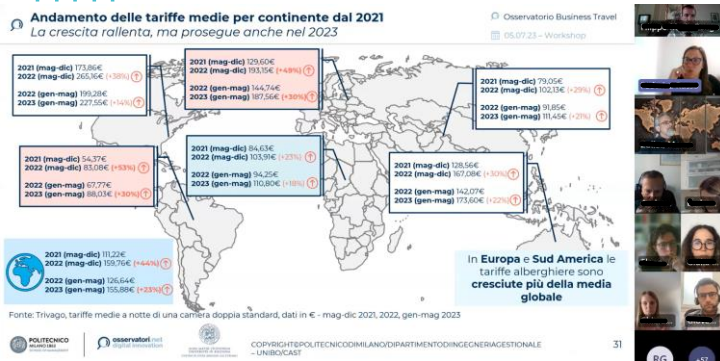


Dissemination of knowledge through public **events, press coverage and social media**

~**1,600** registered in of which **320** attendees onsite at Travel Innovation Day 2024
 > **350** press releases

The Observatory acts as a point of reference, in Italy and increasingly also in the European Union, for understanding the **opportunities** generated by **innovation in Travel** and **supporting** Companies, PA and Destinations and in **mastering the changes** taking place.

Research: updated data and innovative analyses



Possibility to **direct the research** sharing themes of interest

Access to all the Observatory's research **data and analysis**

Qualified discussion and update



Participation to **reserved workshops**

Participation of the Observatory in an **event organized by the Partner**

Effective communication



Participation as a **speaker**

Access to **contacts**

Branding and **visibility**

Market sizing and innovation trends



HOSPITALITY



TRAVELLERS



BUSINESS TRAVEL

MOBILITY



TRAVEL AGENCIES



DMOs





The activities of Travel Innovation and Business Travel observatories

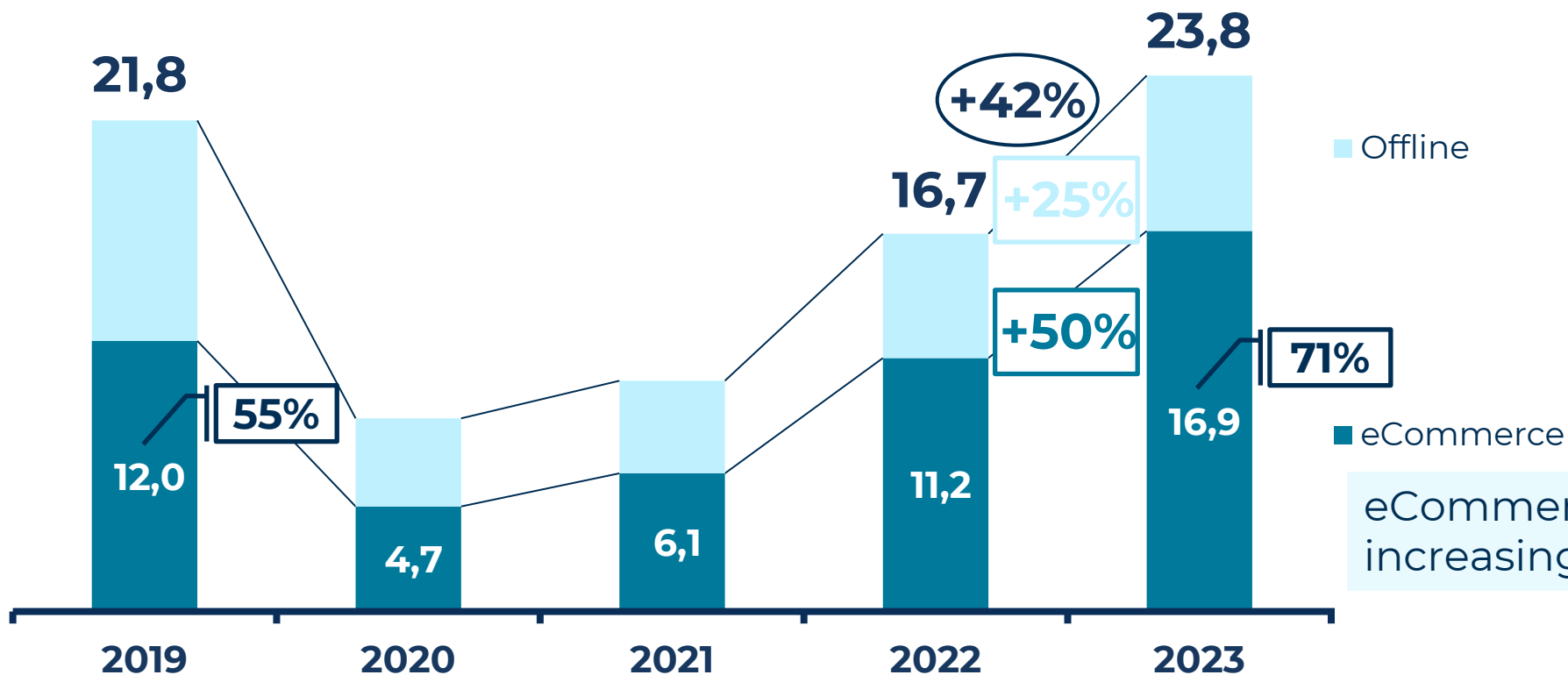


Some insights from market sizing and mobility research



The transportation market is growing and the eCommerce component is leading the recovery

The total transportation market by purchasing channel
(billions of €)



eCommerce is significantly increasing its incidence

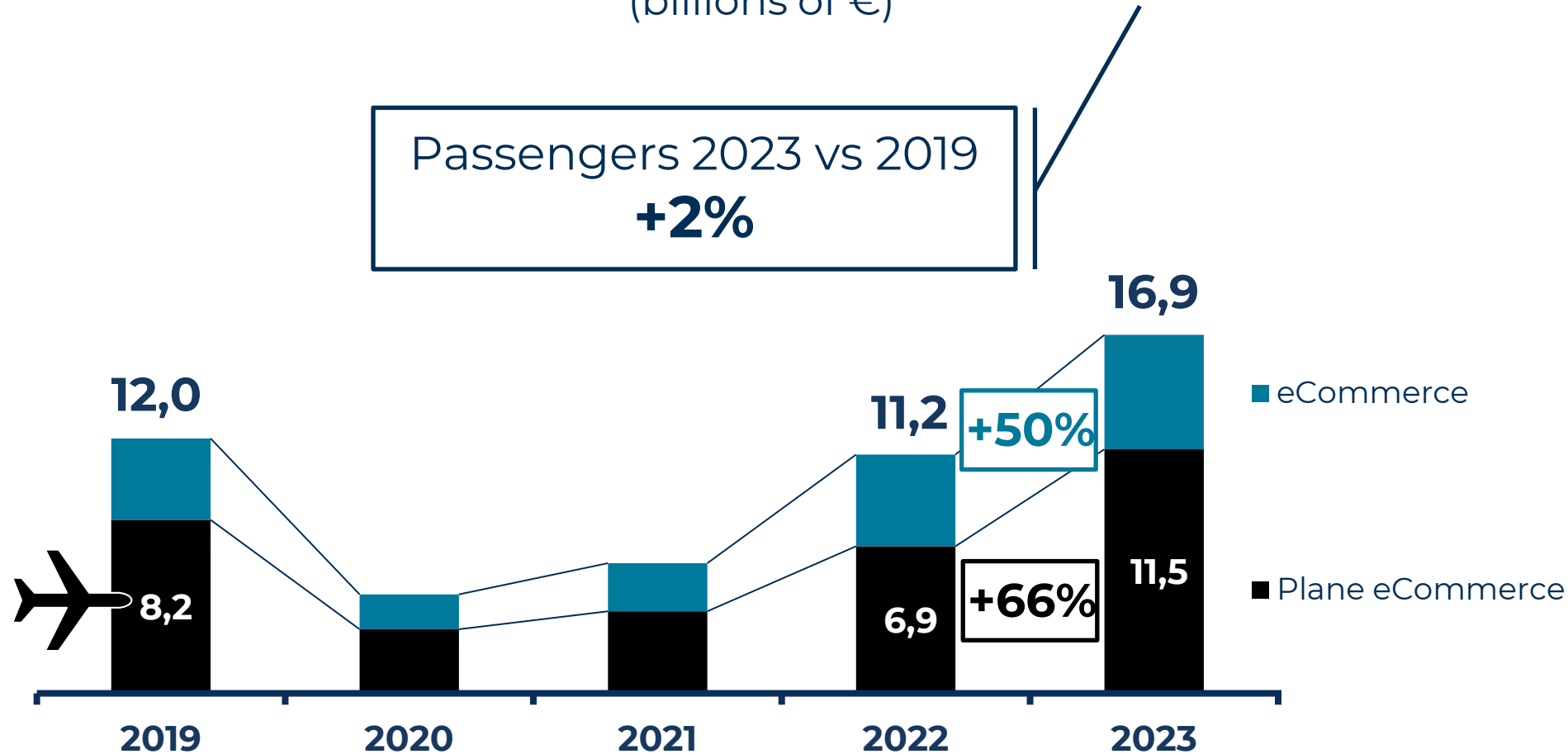
Source: elaboration by the Travel Innovation Observatory



Especially in air transport, where online recorded a +41% in absolute value compared to 2019

The eCommerce of total transport and the aviation sector
(billions of €)

Passengers 2023 vs 2019
+2%

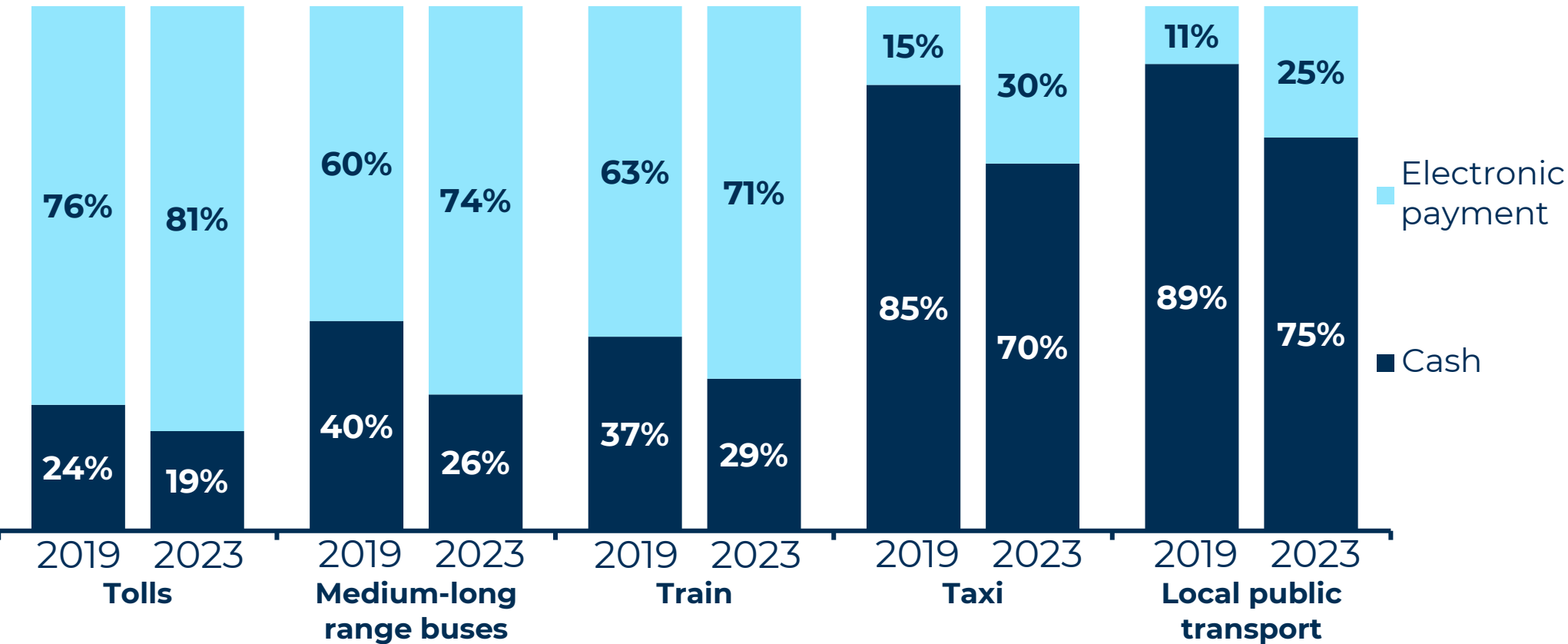


Source: elaboration by the Travel Innovation Observatory



Thanks to the growth of eCommerce, digital payments are becoming increasingly important

The total market by segment by payment instrument (percentage incidence)

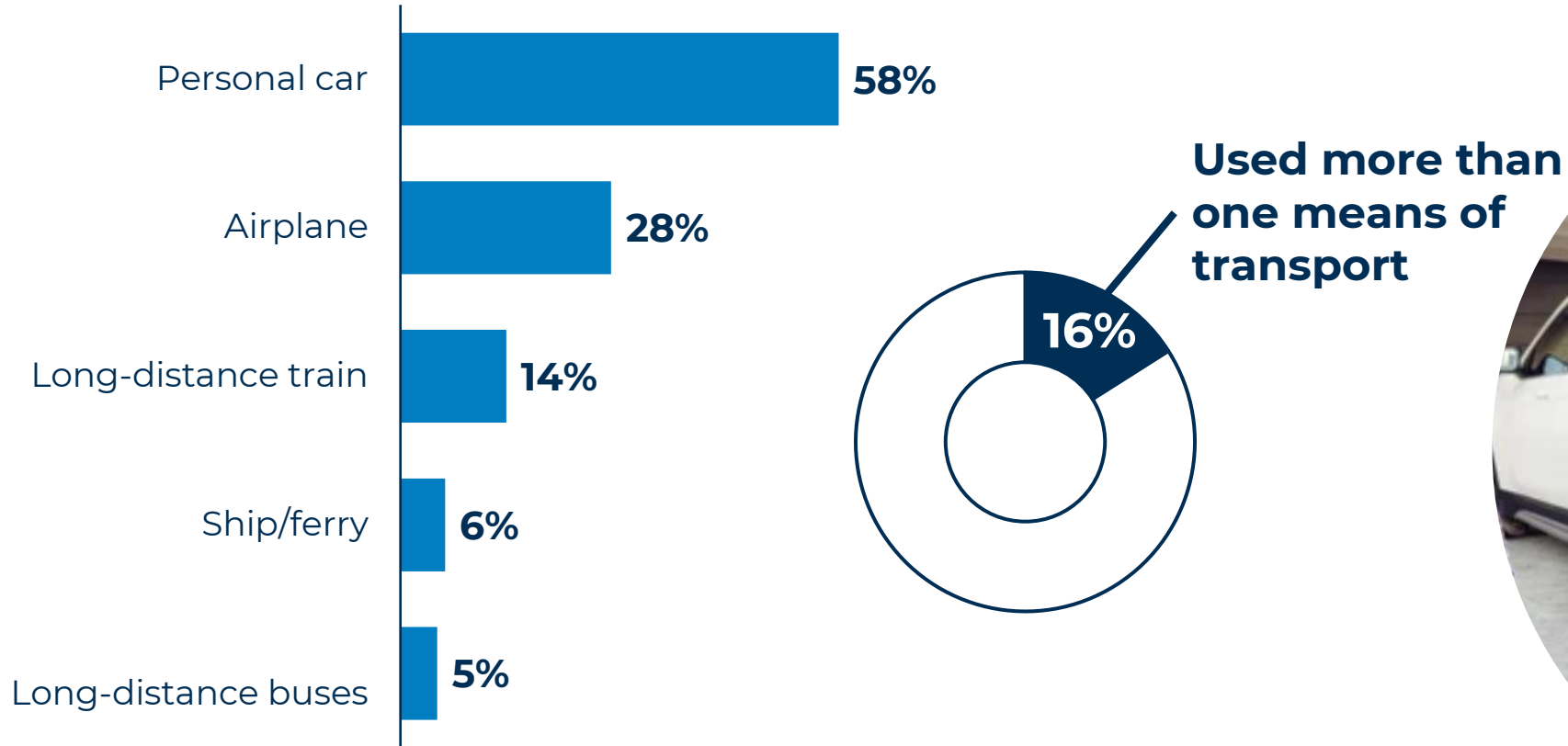


Source: elaboration by the Travel Innovation and Innovative Payments Observatories for research carried out with **mooney**



The plane is the second most used means of transport for holidays

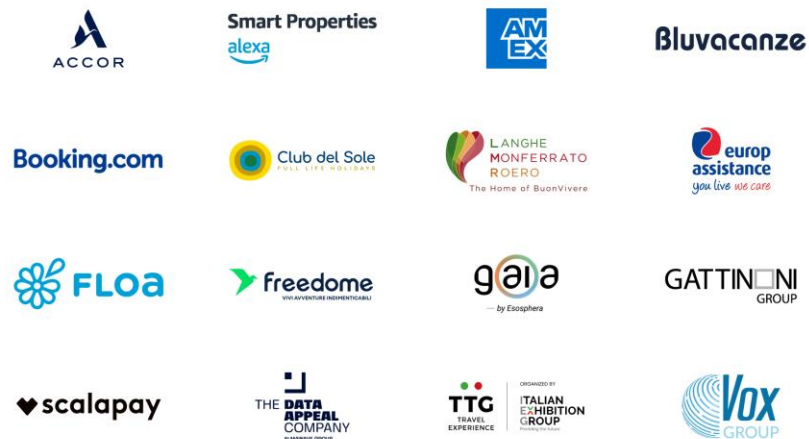
Main means used to reach the holiday destination



Sample: 1,580 Italians

Survey by the Innovative Payments and Travel Innovation Observatories, in collaboration with Ipsos

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