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AGENDA

1. Mobile in Travel, Beyond Distribution
2. Evolution of Traveler Experience and Revenue Opportunities for Suppliers
3. Mobile Vision vs. Consumer Behavior

Mobile in Travel Beyond Distribution

MOBILE IN TRAVEL

DISTRIBUTION TO TRAVELER EXPERIENCE



2013

MOBILE TRAVEL HEADLINES

**Starwood Hotels' 'Keyless Key' Lets
Guests Check Right Into Their Room**

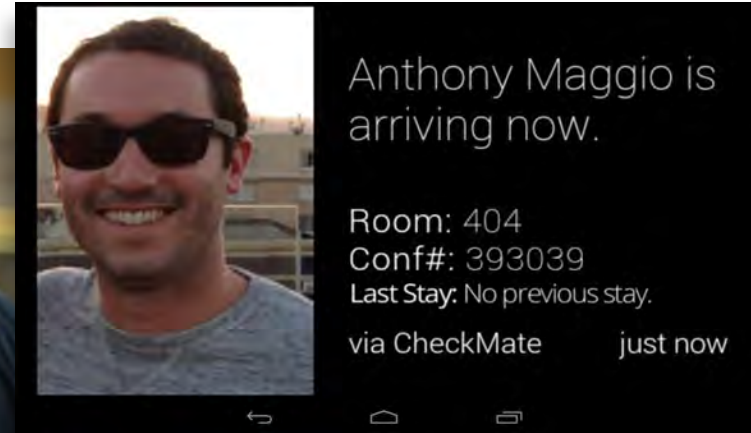
CheckMate Enables
Hotels To Streamline
Guest Check-Ins

Virgin Atlantic staff to check in
passengers using Google Glass

02.12.14

**Marriott Hotels Launches Mobile
Checkout at 329 Properties
Worldwide**

SUPPLIER OPPORTUNITY REVOLUTIONIZE SERVICE

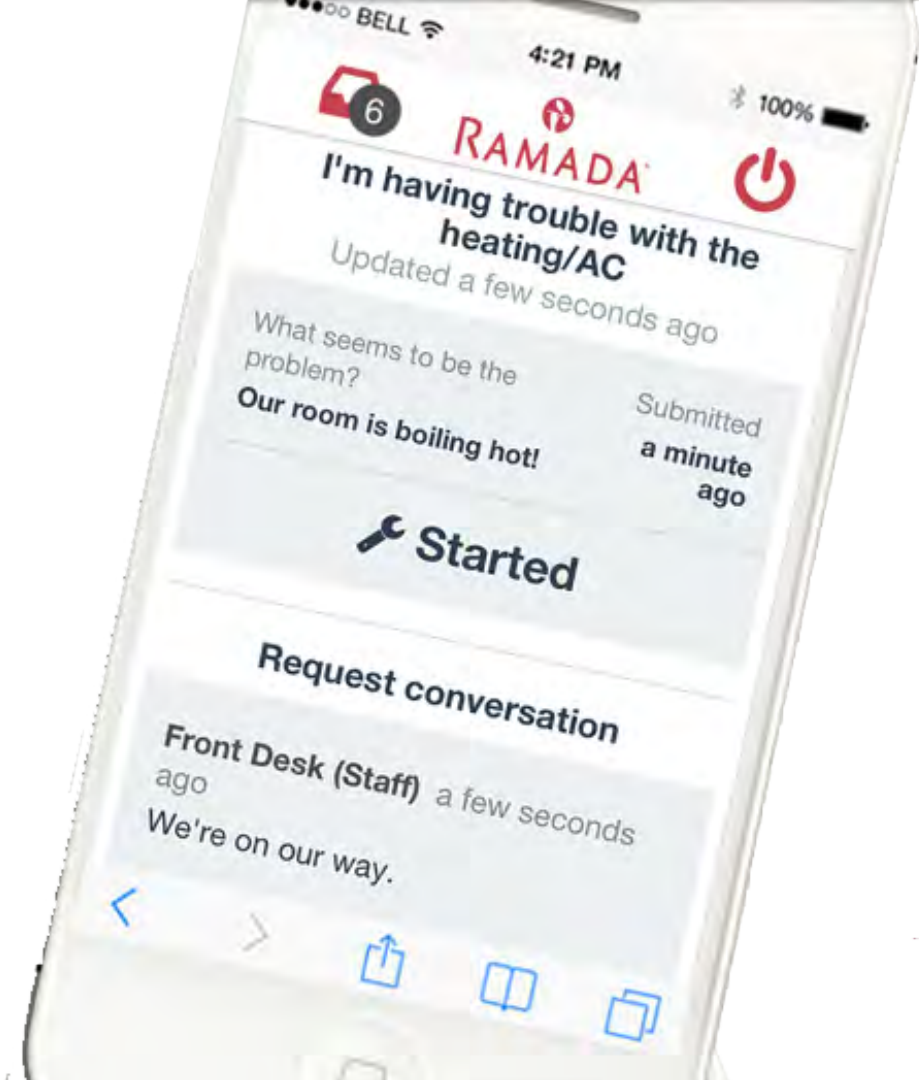


Evolution of Traveler Experience, New Revenue Opportunities

TRAVELER EXPERIENCE

NEW TOUCH POINTS

Booking
Pre-Arrival
Check-in
In-Stay
Check-Out
Post-Stay



AIR & CAR RENTAL

CHECK-IN MERCHANDIZING

Air Travelers

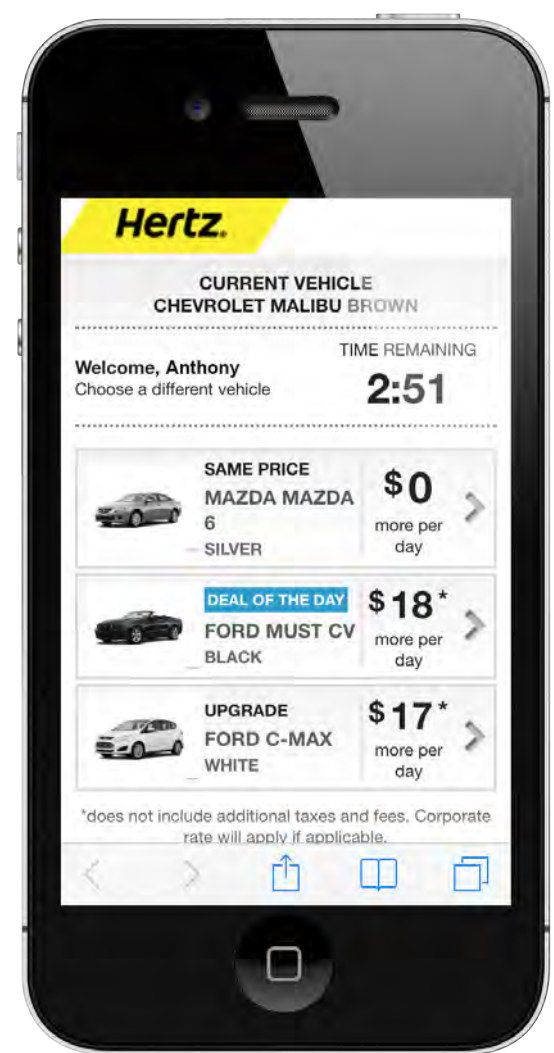
69% used online & mobile check-in

Ancillary Revenue

6% of airline revenue (\$42B in 2013)

Airlines & Rental Cars

Merchandized seat selection, upgrades



HOTELS

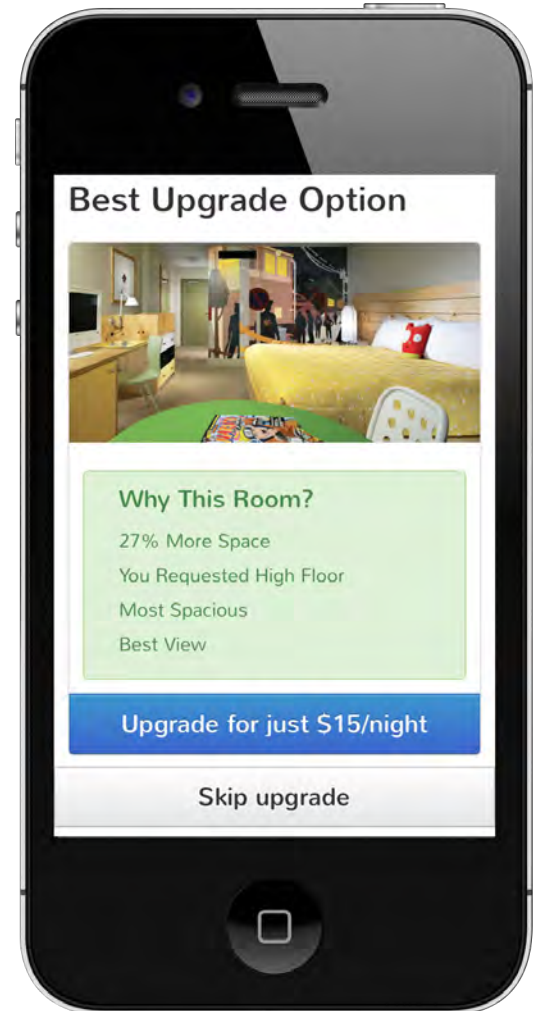
CHECK-IN MERCHANDIZING

Guest Interaction

30-40% use online and mobile check-in

Ancillary Revenue

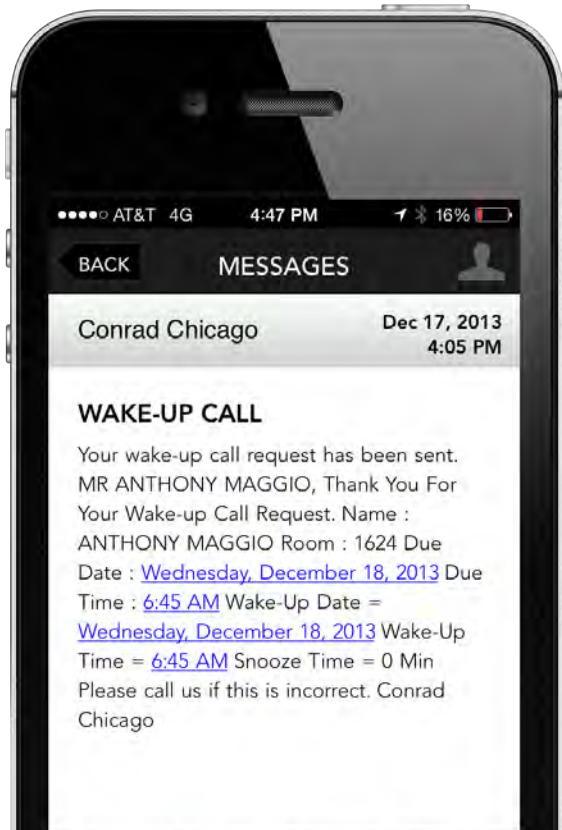
20-30% conversion on room upgrades



Mobile Vision vs. Consumer Behavior

MOBILE VISION VS. CONSUMER BEHAVIOR

IDENTIFY KEY PAIN POINTS



VS



GUEST ADOPTION

HOTEL APP CHALLENGES

[App Store](#) > [Travel](#) > [Marriott International](#)



Marriott International

Marriott International >

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Average Rating: ★★★★★ 20 Ratings

Free

[App Store](#) > [Travel](#) > [Hilton Worldwide, Inc.](#)

★★★★★ (20)

Rated 4+

LINKS

Developer Website

© 2012 Marriott International, Inc



Hilton HHonors

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Current Version All Versions

Average Rating: ★★★★★ 120 Ratings

Free



94 Customer

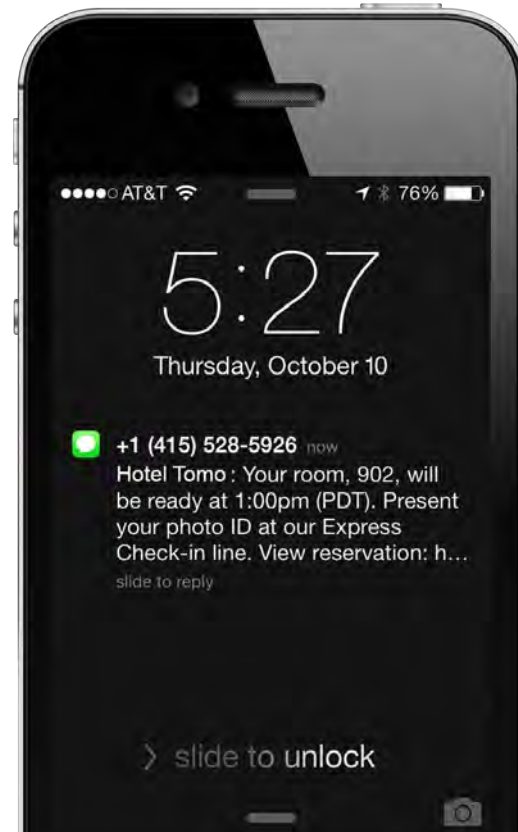
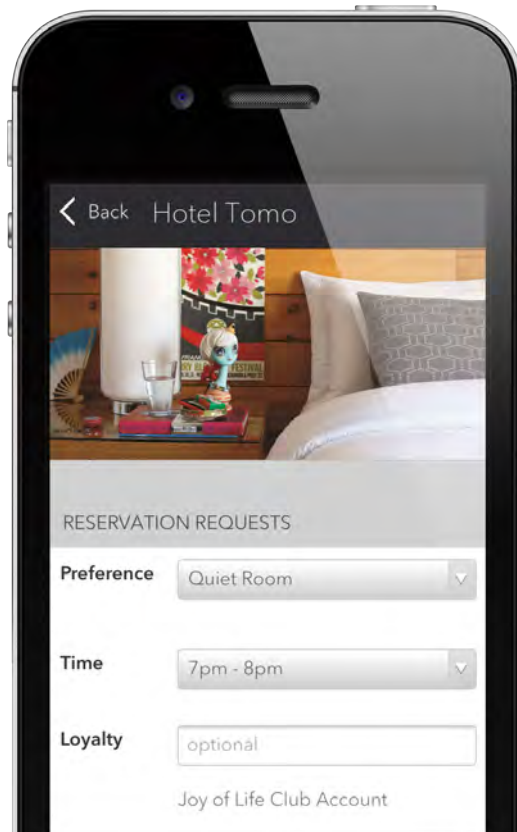
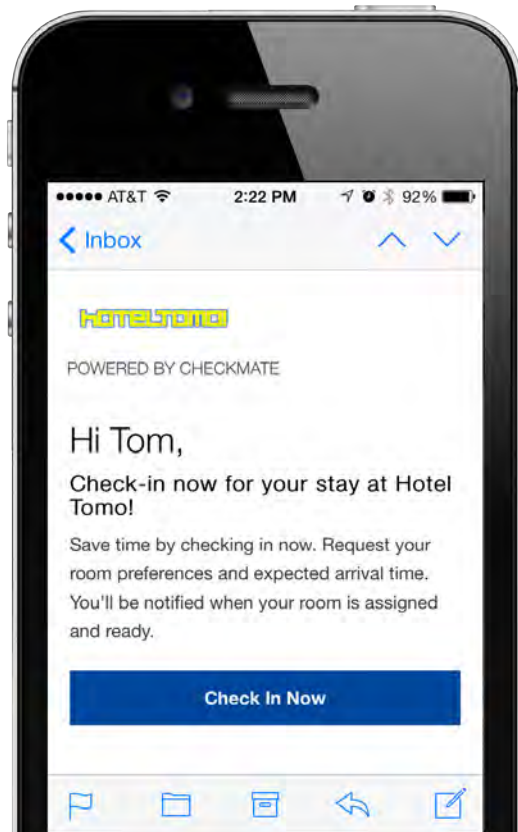
ctionality isn't in this app. You have to log into

Was this review helpful?



MOBILE SERVICES

MORE THAN JUST APPS



PRODUCT DISTRIBUTION

SERVICE DELIVERY & GUEST CONTACT

Services Require Contact Data

- Hotels have guest email for 30-40%
- Services require hotels to normalize operations around technology
- Service platforms can bridge this gap



SUMMARY

QUESTIONS TO CONSIDER

- What are the most salient pain points in our interactions with our travelers?
- Where can mobile help resolve these?
- What are the most effective mediums for providing traveler value and driving revenue?



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