



# Make bold moves with intelligent travel operations

Fast-track to future-ready performance

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Travel is moving closer to the light at the end of the tunnel as parts of the world begin to emerge from the pandemic. Travelers are coming back.

But their behaviors, expectations and values are very different. How can travel companies meet travelers where they are to start getting back to growth? They need to evolve their operations. They need to drive improvements in the travel experience without increasing costs—delivering more with less.





# The work of travel is changing

## Now how work is done must change too

Travel companies no longer have the luxury of keeping enterprise operations as they have been for years. Highly transactional and decentralized operations running on outdated systems are costly and inflexible—the opposite of what’s needed now.

With the workforce and budgets decimated and leisure travel demand springing back to life, travel companies need intelligent operations. This is applying a strategic approach to advancing the operating model and transforming the business through technology, processes and people. It’s how the industry can deliver superior experiences for travelers and employees while navigating cost variability and making the best use of a leaner workforce.

“I see a lot of the old quickly falling away in hospitality... we need to **react differently** and be a **lot more agile** in how we approach problems.”

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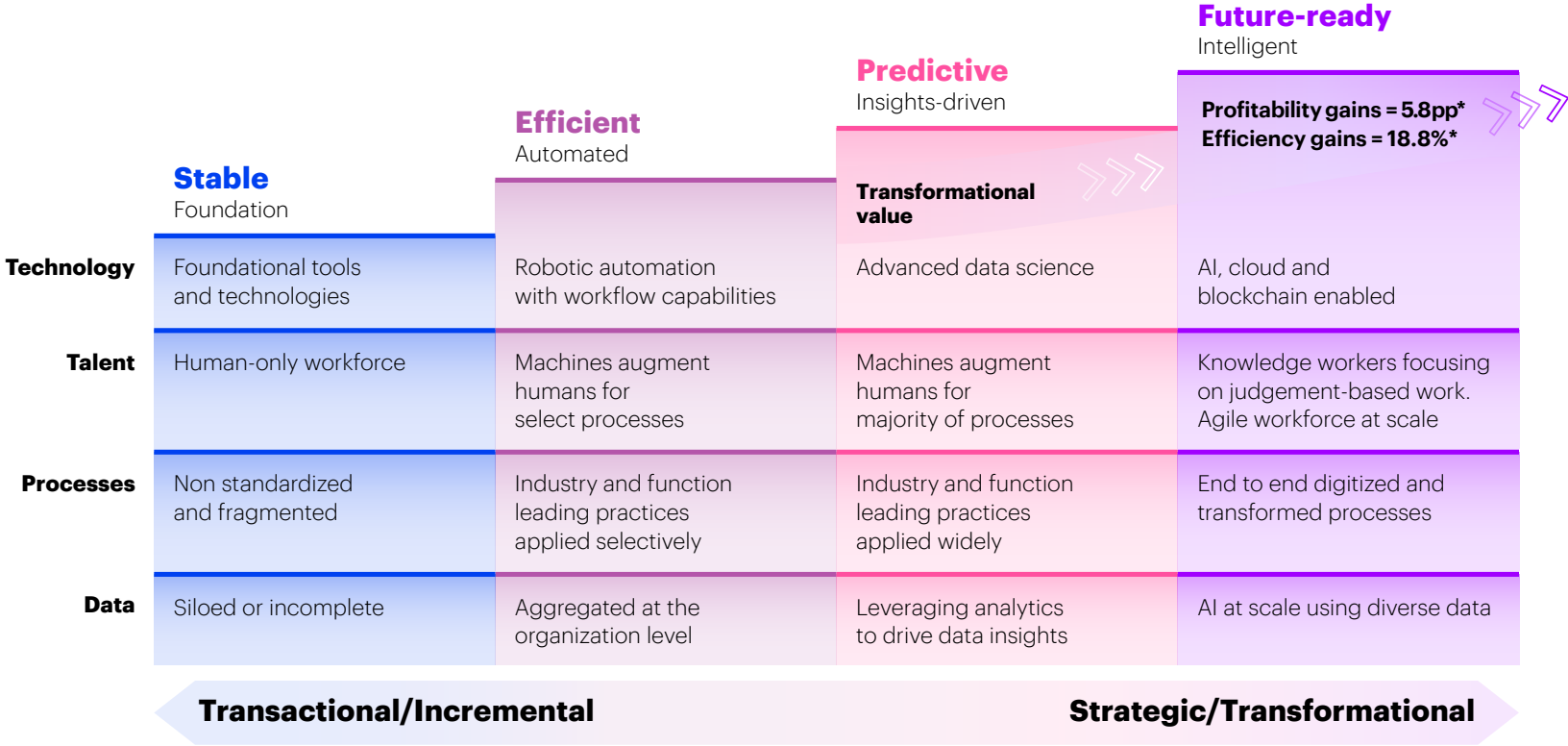
**Senior hospitality executive**



# The case for improving operations

Recent Accenture research<sup>1</sup> reveals the value at stake for travel companies that move to intelligent operations. The global cross-sector research—which includes respondents from 50 travel companies—explores the correlation between business operations maturity and performance. We identified four levels of operations maturity: **stable, efficient, predictive** and **future-ready** (intelligent). Each level is underpinned by a set of technologies that drive efficiency, insights and increasing capabilities (Figure 1).

**Figure 1.** Each level of operations maturity brings more benefits and capabilities to travel organizations



\*Accenture experience shows that additional productivity and efficiency gains up to 30% can be seen in organizations displaying future-ready characteristics.

Source: Accenture Research and Oxford Economics Intelligent Operations Survey, 2020



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Organizations at the highest level of the journey to intelligent operations maturity are future-ready. Our analysis shows that they are leaders in efficiency, profitability, resilience and agility. They also benefit from an improved talent mix, reskilling, customer experience and ecosystem relationships. In addition, they can respond and make decisions rapidly by unlocking data insight. While it is achievable, future-readiness is a high bar. Just 7% of organizations across industries describe their current state as being future-ready today.

### The advantages to being future-ready

**1.7x** higher efficiency than other organizations

**2.8x** higher corporate profitability than other organizations

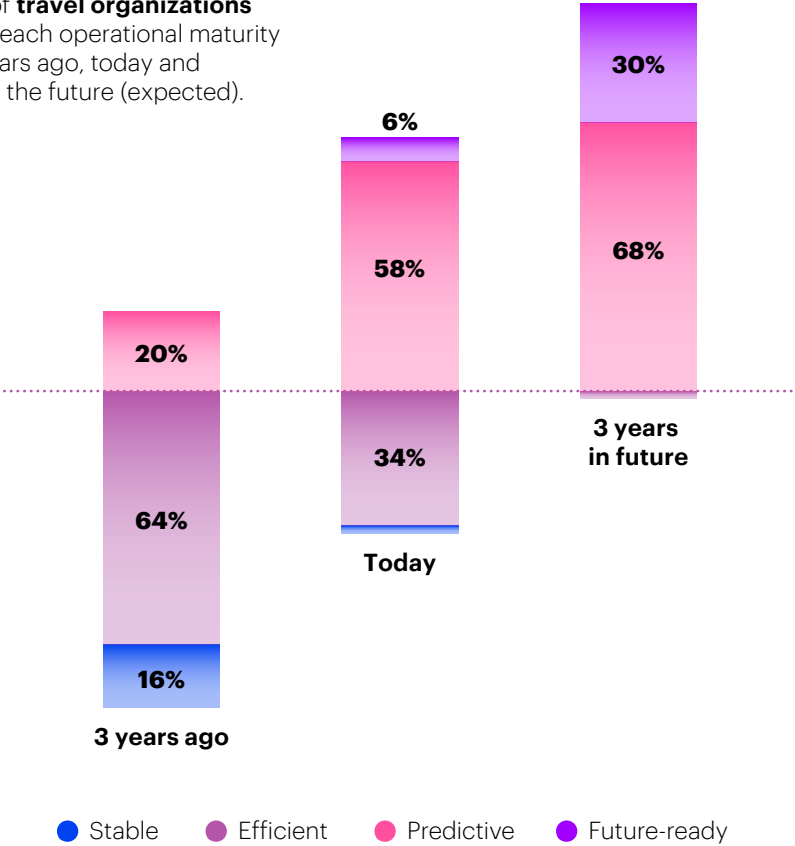


# Aspiration is not actuality... yet

Travel has made gains in operations maturity in recent years. Three years ago, no travel organization described itself as future-ready. Just 20% were predictive, and the majority (64%) say they had efficient operating models. Today, 6% of travel organizations call their operations future-ready, and most (58%) now believe that they have predictive operations. What's compelling is travel companies' ambitions about their operations in three years. By 2023, a full 30% expect to be future-ready (Figure 2).

**Figure 2.** Operations transformation is on the move in travel, but there is a large gap between the current state and future aspirations for future-readiness

Percent of **travel organizations** reaching each operational maturity level 3 years ago, today and 3 years in the future (expected).



Source: Accenture Research and Oxford Economics Intelligent Operations Survey, 2020

This optimism exists despite the fact that we conducted this survey in 2020 when the industry was in pure survival mode. Responses to our interviews with industry experts<sup>2</sup> make it clear how much of a wake-up call the pandemic was for profound operational transformation in travel. It's fair to say that travel players have aggressive ambitions. **To achieve them—and outwit still uncertain market climates—travel companies must break the mold of “how operations are done” with creative pragmatism.**

Our conversations with industry experts signal that travel companies are ready to make bold moves. Traditional travel companies want to learn from digital natives that center operations in experience. Within travel, they note Expedia's and Google's use of customer data to drive pricing and personalization insights. Travel players are also watching digital powerhouses in other industries. Not surprisingly, Amazon was lauded for its ability to understand customers and its relentless focus on customer centricity.

“Amazon is a perfect example of someone that really understands the customer, understands service delivery and understands communication with their customers. I think **the airlines have a lot to learn from very strong, best-in-class retailers.**”

---

**Former senior airline executive**



# The journey back to growth

Looking to experienced leaders like these offers travel companies a way to explore what travel operations could look like moving forward. The art of the possible is a glimpse of travel's next act.

## What if...

- ...operations were actually driven by customers'—and employees'—experience?
- ...travel companies could access customer data across the whole travel ecosystem?
- ...call center staff had data insights at their fingertips so they could focus on solutions that deliver value to customers and the company?
- ...hotel staff and airline crews had a complete view of the customers that elevates how they serve them—surprising and delighting them while differentiating the brand?
- ...companies could embed the highest degree of personalization in any individual customer journey at any moment?
- ...AI algorithms made it possible to optimize customers' and employees' journeys through airports?
- ...AI allowed travel players to double down on ancillary services to grow revenue?
- ...robust data protection techniques were embedded into the operating model?

**Travel companies have no choice but to look through this experience-centered lens to plot the journey to future-ready operations. Forces in travel have created entirely new frames of reference for how companies should think about and evaluate operating models.**

During the pandemic, cost and operating efficiencies were top operations priorities for 24% of travel executives, according to our research. These are still fundamentals in a do-more-with-less environment. However, as the industry opens back up, experience is a touchstone. Operations must accommodate post-pandemic travelers and the ways they have changed—from their concern for health and safety to the blurring of leisure and business travel. In fact, 7 in 10 consumers believe that their ways of travel will experience permanent change post pandemic.<sup>3</sup> Historical data is not helpful in truly knowing today's travelers.

What's equally challenging about this period is that not only are travel companies evolving operations, many are literally restarting them. With demand plunging during the crisis, companies halted some operating processes and automated others.

**7 in 10** consumers believe that their ways of travel will experience permanent change post pandemic

“Resilient businesses do **know their customers** to begin with. Because without customers, there is no revenue. And without revenue, there is no business.”

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**Senior hospitality executive**





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Building a strategy in an environment of so much challenge and change is no easy task, especially considering that some pandemic operational changes are likely to be permanent. In addition, hospitality players have to rethink operations around complex ownership and management structures. All travel companies must address a depleted workforce that is not naturally agile. The reality is that many travel operating jobs have long tenure, and workers may find reskilling difficult. And finally, legacy technology is a clear barrier to scaling operations transformation in travel.

**Travel executives see developing the right strategy as the top challenge to scaling in key areas and improving operating model maturity.**

# How to get where travel wants to go

The good news is that our research reveals the strengths that travel companies can build on and the weaknesses that they have to address to make the most of intelligent operations. The research also points to three fundamentals that travel organizations must know to become future-ready.

01

**Know the  
ultimate goal**

02

**Build an  
actionable plan**

03

**Leapfrog  
maturity levels**



# 01 Know the ultimate goal





## Think big—and be bold

Travel players acknowledge that the lack of a cohesive strategy is a primary barrier to achieving operational transformation. The matrixed nature of travel companies often leads to multiple competing priorities. At this critical moment in travel, operational transformation disconnected from an overall strategy can produce lackluster results when what companies need is quick action and real impact.

Leaders can drive change by being as bold as their ambition for change is. They should question everything as if working from a blank page. The key is to understand what they want to deliver and ask: “What would we do here if we had no constraints?” Guardrails can come later. After all, making traction in evolving operations requires transformational moves. Companies that are not bold enough risk seeing their competitors—particularly digital natives born with intelligent operations—beat them to it.



## Commit to making data-driven decisions with better data

Travel companies cannot quickly and effectively understand and act on data because of endless organizational silos. Yet the industry needs holistic, data-driven operations to be experience driven.

To reach this goal, companies should smash the silos in their technology infrastructure with a new data model. By focusing on a specific problem, making data accessible through the cloud and using analytics to address that problem—and also making it available for the next team or the next problem—industry players can create value from day one that can fund the next infrastructure investments. Imagine the possibilities if airlines could combine *all* of their operational data and discrete optimizers (fleet, crew, maintenance, passengers) to develop a model that minimizes recovery cost in case of disruption—and that can identify the risk of disruption and how to mitigate it before it happens.

**Data is at the heart of the travel business and experience, particularly as companies move to recover and grow from “a lost year.”**

What the data tells them about today is invaluable. Executives report that they are using data to make models to enable choices for customers, starting with experiential design. This is using evidence-based design principles to create experiences and improving them through experimentation. The data is helping travel companies zero-in on priority use cases—which is invaluable in a revenue and resource-constrained environments—and helping them make proactive changes to stay relevant. For example, these approaches can help airlines “present” offers to customers in ways that encourage them to choose the ones that are most valuable to the airline.





### Profile of an operations leader

With data-driven operations, a multi-national technology solutions provider has a 360-degree view of prospects. Every high-potential lead can be tagged, tracked and rapidly followed up with new, actionable insights and recommendations. This has transformed conversion rates. The company is serving 2.5 million leads a year—three times as many than it was handling before.

**2.5M** leads a year



# 02 Build an actionable plan



## Collaborate across business and technology

Only 1 in 10 travel companies has scaled business and technology collaboration today, which is close to cross-industry standards. However, it is far from the standards set by future-ready organizations. Across industries, 55% of them have broken down business-IT barriers at scale—and 86% expect their business and technology functions to collaborate fully by 2023. Forty-eight percent of travel companies expect to be using business-technology collaboration at scale in this timeframe.

Breaking down organizational and cultural boundaries between business and IT is inherently challenging. After all, even the silos have silos in large travel technology organizations. In one of a slim few silver linings from the crisis, business-technology collaboration gained momentum. Forty-two percent of travel companies were able to respond well to pandemic because of this collaboration. Now the challenge is to build on the momentum that happened out of sheer necessity. Change has to start at the very top of the organization. Some hospitality players have already made changes to their reporting structures such that CIOs and CDOs are recognized as business people first, technologists second.

1 in 10

travel companies  
has scaled business  
and technology  
collaboration today

55%

of future-ready  
organizations across  
industries have broken  
down business-IT  
barriers at scale

48%

of travel companies  
expect to be using  
business-technology  
collaboration at scale  
by 2023

86%

of future-ready  
organizations  
across industries  
expect to be using  
business-technology  
collaboration at scale  
by 2023



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## Automate at scale to augment human talent

Travel has made solid strides in automation. The percent of travel companies at widespread or full-scale automation use has increased more than 2.5x over the past three years. But there is still work to do. Many travel companies layer automation onto existing business processes, without rethinking how the process itself should change—and what the optimal combination of human and machine talent is. Take aircraft maintenance, for example. Airlines have automated analytics to support predictive maintenance. But most have not automated associated decision making because of hesitancy that machines will make the wrong decisions.

The issue of human and machine harmony in automation has special resonance in travel. By its very definition, hospitality thrives on human-to-human interaction. This is why it is so important that travel players automate carefully to augment interactions, rather than replacing the human touch completely. As hotels and airlines expand their use of guest-facing chat bots, balancing this equation is critical. This is true in terms of both the guest experience and the employee experience. More automation will have a ripple effect on the talent that functional areas need, driving reskilling initiatives.





### Profile of an operations leader

A global food and beverage company is using intelligent operations and automation to transform human resources, among other back office functions. The company applied robotic process automation to eliminate bottlenecks in “hire-to-retire” services. Automation and analytics also helped the company meet governmental requirements for employee recordkeeping and payroll accounting accuracy. By standardizing and automating processes in HR and Finance, the company has saved more than \$5 million to date, which can be re-invested to fuel growth.

**\$5M** savings to date

## Invest in AI to get ahead of change

Sixty-two percent of travel organizations say they are using AI widely or at scale. Of all the potential value that AI can bring—from processing massive data sets at speed to creating more frictionless travel experiences—perhaps the most resonant right now is using it to predict change accurately and manage disruption effectively. Imagine if an airline could use AI to centralize analytics insights across flight crew, passengers and destination to proactively avoid a scheduling disruption before it happens. Or imagine if an on-property manager could use an AI-powered integrated scheduling platform to get the right people scheduled at the right time at the right place for better employee experience and enhanced compliance. These things are happening already.

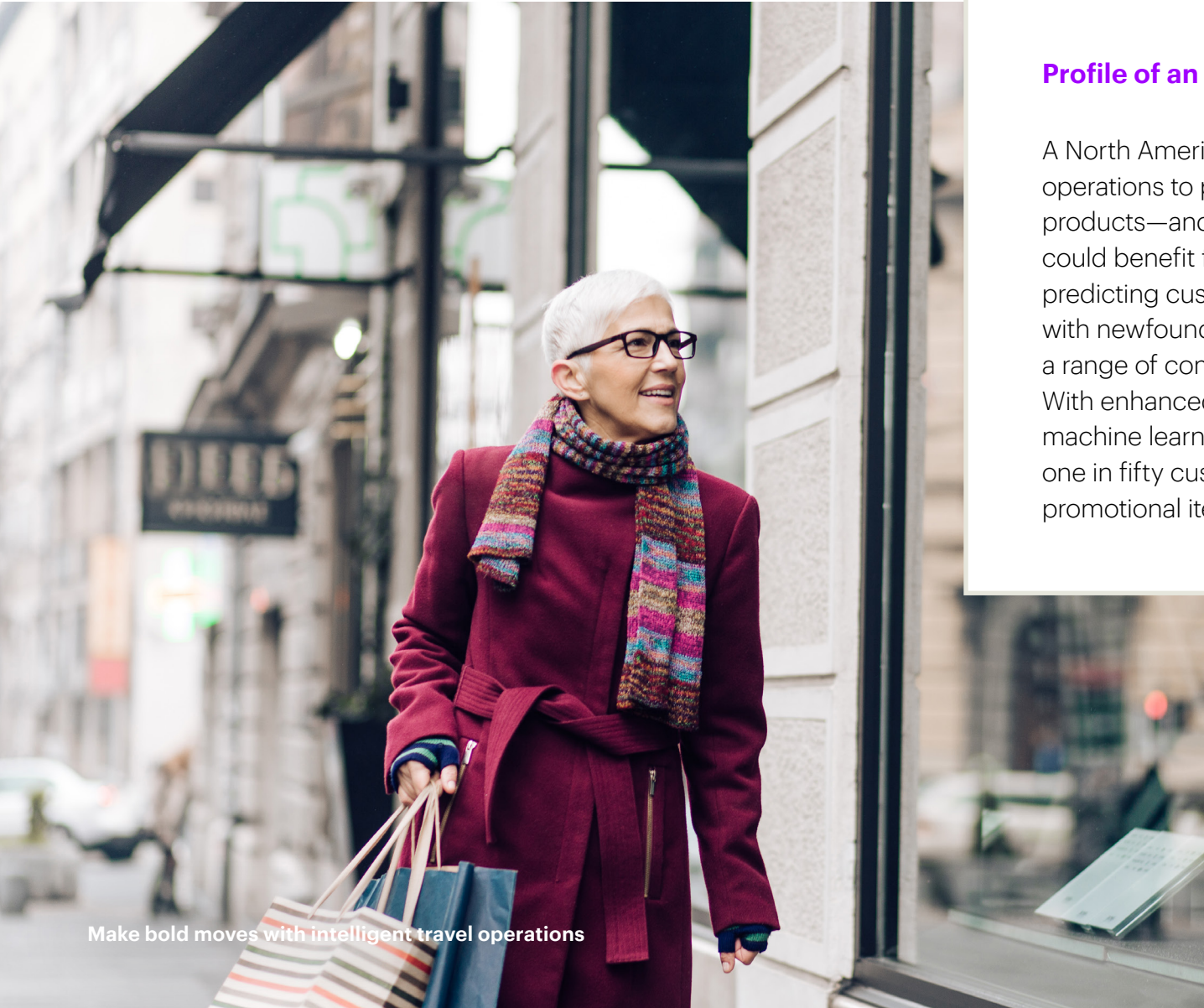
One airline is interested in using AI to increase ancillary revenue as the segment looks for creative ways to increase revenues with average fares still not having fully recovered. As one former airline senior executive sees it, airlines “are not capitalizing on the rich data they have, and there’s absolutely a migration in pooling data and trying to understand data, do predictive modelling and put offers in front of customers that aren’t just about the flight itself.”



# 62%

**of travel organizations  
say they are using AI  
widely or at scale**





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### Profile of an operations leader

A North American retail chain turned to intelligent operations to predict and meet demand for promoted products—and ensure that as many customers as possible could benefit from store promotions. The focus was on predicting customer demand and adapting store allocation with newfound precision and flexibility, taking into account a range of complex interlinked factors in each locality. With enhanced demand planning and forecasting using machine learning models and order management, now just one in fifty customers walks into the store unable to buy a promotional item. Before, that number was one in ten.



## Scale cloud investments

Future-ready operations in travel run through cloud. Not only can cloud help travel players unlock the full value of their data with on-demand processing capability, it can enable new operational efficiency, resilience and experiences. Cloud is a secure infrastructure and a platform for new growth.<sup>4</sup> A hospitality senior executive views the case for cloud like this, “You need a cloud-based data model. Because, generally, the scale of that data in hospitality is simply too large and too elastic to handle in house.”

With such a strong business case for cloud, it is no surprise that cloud is one of the most popular—and important—technologies being applied today. Cloud adoption is a natural movement for travel organizations, particularly as they look to scale the impact of automation, AI and other digital technologies. Even so, cloud adoption has been underwhelming in the travel sector, hampered by the complexity of aging systems, security concerns and worries about system downtime. The industry has to move past these false barriers quickly. Cloud is non-negotiable for agility and customer-centered innovation, and companies don’t have to give up resiliency during the transition to emerge stronger.





# 03 Leapfrog maturity levels

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## Build technology ecosystem relationships

Operations maturity is a journey, not a destination. Travel companies can continually improve. In fact, our analysis suggests that jumping just one maturity level can lead to a projected 17% increase in global profits.<sup>5</sup> Ecosystem partnerships with technology players can help travel companies leapfrog maturity levels. If travel companies didn't fully realize this before the pandemic, many have since. Over half (58%) have seen their ecosystem partnerships improve over the past three years. And one-third have focused more on these partnerships as a result of COVID-19. Interestingly, the travel industry's shift to developing ecosystem relationships has been much swifter than across other industries. Case in point: 44% of travel executives currently rate ecosystem partnerships as a top-three business goal (up from 32% three years ago) compared to 34% of executives across industries.

**17%** projected increase in global profits from jumping just one maturity level

**44%** of travel executives currently rate ecosystem partnerships as a top-three business goal

Now more than ever, travel companies realize that partners can help speed and streamline transformation. Prospective partners realize what a difficult moment this is for the industry, and they have invested to build services for travel. We are seeing some travel companies accelerate cloud adoption through creative financing arrangements with cloud hyperscalers. Others are advancing to intelligent operations by working with trusted partners that offer them at-the-ready processes, advanced digital technologies and skills—and that are incentivized to continually improve their capabilities.



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### NH Hotels: Checking into intelligent operations

Over the past two decades, NH Hotel Group (NH) has grown steadily through organic growth and acquisitions. These acquisitions brought new processes, systems and ways of working. NH knew that it needed to tackle the resulting inefficiencies to improve margins and competitiveness and ultimately make Finance as trusted partner to the business.

With intelligent operations, NH is continually enhancing service levels, increasing compliance and reducing costs associated with managing F&A processes, becoming a reference within the hospitality sector. Automation, AI and a lean organization structure have already improved productivity by 45%. Enhanced and timely reporting means the company can make better, faster decisions and identify areas needing improvement on a continual basis. Also, because it can scale quickly as the company grows organically and inorganically, the new approach to F&A is helping the company make the most from its acquisitions.

**45%** improvement in productivity due to automation, AI and a lean organization structure



A silhouette of a person's head and hand is shown in profile, looking out of an airplane window. The person is holding a pen. The window shows a bright sunset or sunrise over a body of water, with a large, dark, curved shape (possibly a wing or tail) visible in the sky. The overall mood is contemplative and forward-looking.

# It's time for creative pragmatism



Travel companies have aggressive ambitions to evolve their operations to deliver the kind of experiences that can lead them back to growth—at the right cost. Pursuing the journey to intelligent operations takes commitment, intention and courage.

There is no one-size-fits-all approach to change. Much of it depends on a company's starting point and desired destination. Yet no matter the path they take, travel companies' investments in operations transformation and their commitment to change management must be equally aggressive.

This is why it's important that travel companies begin the journey with an objective assessment of where they stand now. They should lay out specific ground rules, avoiding getting stuck on what can't be done and doubling down on what can be done, and move through key actions from there:

- Think big**—and be bold
- Commit** to making data-driven decisions with better data
- Collaborate** across business and technology
- Automate** at scale to augment human talent
- Invest** in AI to get ahead of change
- Scale** cloud investments
- Build** technology ecosystem relationships

By being open, creative and pragmatic, travel players can drive operations transformation that delivers the outcomes they need—without placing all their bets on one contract or system that doesn't ultimately deliver.

**Travel companies are up  
for the challenges ahead.  
Because after all, travel isn't  
only about the destination.  
It's about the journey.**



# About the authors



## **Scott Davidson**

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Scott Davidson is a leader in our travel practice who helps airlines, hotels and other hospitality companies deliver true transformations across their business. Scott helps industry executives understand the art of the possible and a path to get there which accounts for perceived and real constraints. In the current COVID-19 recovery period, he defines ways to deliver top-line growth at the current cost structure and identifies revenue diversification opportunities for future resiliency.



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Roshan Patel is the Global Travel Intelligent Operations Lead and Accenture Hospitality Services Finance Lead. He has around 15 years of experience in consulting, finance transformation and intelligent operations within the Travel industry.

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## We defined the four levels of operations maturity based on respondents' assessments of eight characteristics:

### **Analytics**

Covering the discovery, interpretation and communication of meaningful patterns in data to provide superior insights for business decision-making. Analytics includes multiple levels from basic descriptive reporting to more predictive and prescriptive actions which can be applied to business processes.

### **Artificial intelligence**

The ability of a machine to perform cognitive functions like sensing, comprehending, acting and learning. AI capabilities (for example, natural language processing, machine learning) enable computers to make decisions and identify patterns and insights for future decision making.

### **Automation**

Sets of technologies that perform repetitive rule-based tasks. Robotic process automation (RPA), one of the most frequently used examples, increasingly includes multiple solutions such as workflows, platforms and software-as-a-service that further digitize the process.

### **Business-technology collaboration**

Comprising IT and business functions with joint governance models, enabling integrated ecosystem partners and driving the organization's strategic road map.

### **Data**

The quality, scope and depth of structured and unstructured data (for example, video, web content, voice memos, and so on) from diverse internal and external sources, including what is embedded in internal processes.

### **Functional and industry leading practices**

Ways of doing business within a function, organization or industry that are recognized as enabling best-in-class performance.

### **Stakeholder experiences**

The overall engagement experience across all stakeholders of an enterprise including customers, end clients, suppliers, partners and employees.

### **Workforce agility**

Encompassing two key elements: on-demand, collaborative workforce strategy and a work environment where humans and digital machines work together to drive the best outcomes.



# What we did

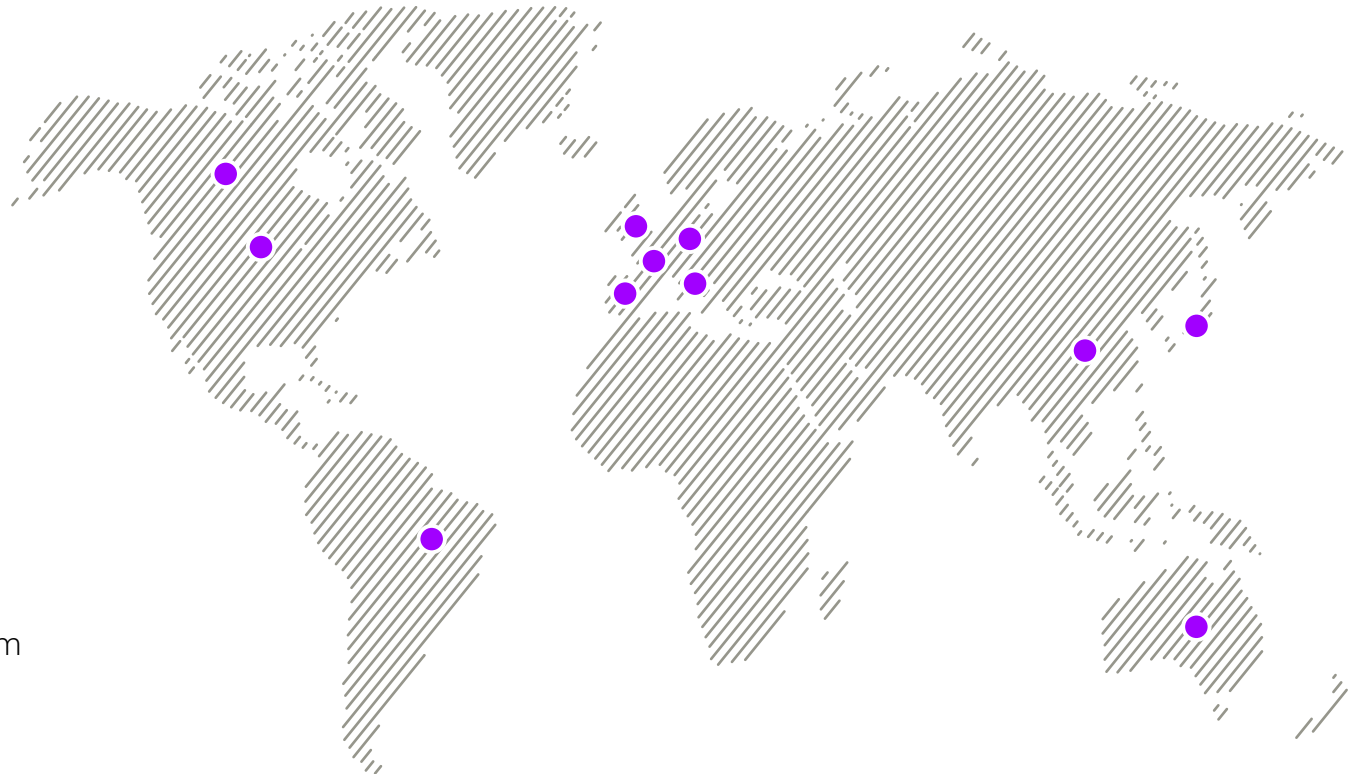
## Primary research

Accenture Operations and Accenture Research undertook a 2020 survey, run by Oxford Economics, among 1,100 executives globally—44% of whom were C-level or equivalent—across 13 industries and 11 countries. Oxford Economics also conducted 12 in-depth, off-the-record interviews with executives across countries and industries.

### 11 countries

<b>125</b>	Australia	<b>50</b>	France	<b>50</b>	Spain
<b>50</b>	Brazil	<b>50</b>	Germany	<b>125</b>	United Kingdom
<b>50</b>	Canada	<b>50</b>	Italy	<b>375</b>	United States
<b>50</b>	China	<b>125</b>	Japan		

**Figure 4.**  
Survey demographics Part 1



Source: Accenture Research and Oxford Economics Intelligent Operations Survey, 2020

**Figure 4.**  
**Survey demographics Part 2**

## Industry

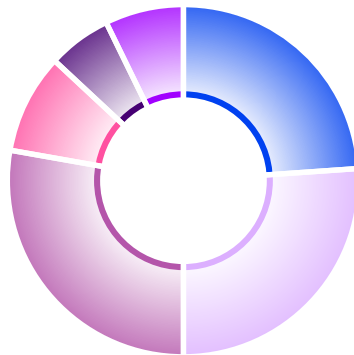
54 | Procurement

## Country

6	Australia	2	Italy
2	Brazil	3	Japan
1	Canada	2	Spain
4	China	12	UK
4	France	15	United States
3	Germany		

## Revenues

13	US\$2B to US\$2.9B
14	US\$3B to US\$5.9B
15	US\$6B to US\$9.9B
5	US\$10B to US\$19.9B
3	US\$20B to US\$49.9B
4	US\$50B or more



## Roles (to nearest equivalent)

20	Chief Procurement Officer
34	Direct report to Chief Procurement Officer



## Economic modeling

Our modeling is based on data from the 2020 Accenture Research and Oxford Economics survey. Each participant was asked about their company characteristics (for example, industry, employment and revenues) and past, current and expected level of operating maturity. Financial data from 2017 to 2019 for each public company was matched from S&P Capital IQ including EBITDA, revenue growth and total shareholder return.

We identified a group of future-ready organizations based on their operating model maturity and analyzed the key underlying factors and operational maturity actions that differentiate these organizations from their peers. This involved developing and implementing econometric models of the relationship between organizational differences in operating maturity position (based on four categories: stable, efficient, predictive, and future-ready, which identify increasing levels of operational maturity) and key financial outcomes. See Figure 5.

The modeling framework also controls for background differences across firms such as geographic location, industry and size. Using our model, we were able to assess the nature and magnitude of the connections between operating maturity, business investments and business outcomes. For example, we found that companies that were just a single step higher up the ladder of operational maturity in 2019 exhibited, on average, better returns. Moreover, investments in leading practices AI and automation were most strongly linked with improved performance.

Scenarios: Using our model and secondary data from S&P Capital IQ, we assessed the implications of hypothetical scenarios of companies raising their maturity level. For example, if all companies were to take a one-step improvement (for example, from stable to efficient) then global profitability, captured by EBITDA, could rise by as much as US\$1.9T (17%). If they were all future-ready, then profits could be US\$5.4T higher (48%).

**The report includes case studies and stories from our own experience of guiding 400 clients on the journey to intelligent operations—33% of Fortune 500 companies or 60% of Forbes G2000 companies.**

We have helped organizations in 20 countries (Australia, Belgium, Brazil, Canada, China, France, Germany, Greater China, India, Ireland, Italy, Japan, Netherlands, Singapore, Spain, Sweden, Switzerland, United Arab Emirates, United Kingdom and United States) and 18 industries (Automotive, Banking, Capital Markets, Chemicals, Consumer Goods & Services, Communications & Media, Energy, Health, High Tech, Industrial, Insurance, Life Sciences, Natural Resources, Public Services, Retail, Software & Platforms, Travel and Utilities) to achieve intelligent operations.

## Figure 5. Measures of financial performance

The tables below describe the various financial metrics used in our modeling:

### Financial metric

#### EBITDA, % of revenue

#### Operational efficiency (OPEX per dollar revenue)

Revenue growth  
Total return to shareholders  
Changes in market capitalization  
Productivity (revenue per employee)  
Return on invested capital, %  
Operating profit, % of revenues

### Alternative variants of the financial metric

Change (total and average) in metric since 2019 vs 2016  
Three-year average metric 2017 to 2019  
Metric in 2019  
Dummy variable identifying companies in the top percentile of revenue growth, profitability and efficiency

We were only able to find robust, statistically significant relationships for **profitability** and **operational efficiency**.



# References

- 1** Accenture, “Fast-Track to Future-Ready Performance,” at <https://www.accenture.com/us-en/insights/operations/future-ready-operations>
- 2** Using a third-party research firm, we completed interviews with senior travel industry executives in hospitality and airlines to learn more about the status of the industry when it comes to operating models’ maturity, and also to better understand the pandemic’s impact on current travel operations.
- 3** Accenture Consumer Pulse Research, conducted Feb 25, 2021 to March 5, 2021
- 4** Accenture, “The Cloud Imperative for Travel Industry Technology,” 2021 at <https://www.accenture.com/us-en/insights/travel/cloud-imperative-travel>
- 5** Accenture, “Hyperscale Your Cloud Journey: Partner for More Value,” at <https://www.accenture.com/us-en/insights/cloud/hyperscale-cloud-journey>

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## About Oxford Economics

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