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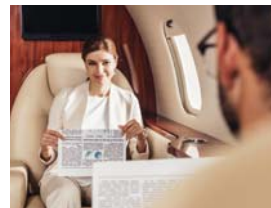
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A recent McKinsey survey based on 5,000 travelers outlines new target trends

The new era of luxury tourism

Recent research by McKinsey shows that demand for luxury tourism and hospitality is expected to grow faster than for any other industry segment. This growth is being powered in part by a sharp rise in the number of individuals globally with net worths between \$1 million and \$30 million. But it's also resulting from a large and expanding base of aspiring luxury travelers with net worths between \$100,000 and \$1 million. They're younger and increasingly willing to spend larger shares of their wealth on upscale travel options. They have their own set of preferences. They might splurge on special occasions, prefer visibly branded luxury, demand value for their money, and pay close attention to loyalty program points and benefits. They might be willing to spend big on individual components of their travel—such as a helicopter tour or fine-dining experience—but not on every aspect of a trip. Aspiring luxury travelers often rely on branding to validate their sense that an experience is luxurious. Strong luxury-hospitality brands can explore creating entry-level offerings to engage with this segment. Existing luxury brands can also cross categories to capitalize on this segment. For instance, Bulgari entered the hotel space as part of a collaboration with the Ritz-Carlton Hotel - the luxury watchmaker is expected to have a dozen collaboration-driven properties by 2026. Elle, the global lifestyle brand, has announced it will launch two hospitality ventures: Maison Elle and Elle Hotel. And high-end shoemaker Christian Louboutin opened a boutique hotel on Portugal's coast. In an interview with McKinsey, Matthew D. Upchurch, Founder, Chairman, and CEO of the luxury-travel advising network Virtuoso, said that "luxury is an overused word, and not just in travel. People might try to quantify it and define it according to spending amounts. But to me, it's more nuan-

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Grootbos Private Nature Reserve - South Africa

LUXURY TOURISM: MCKINSEY'S NINE PERCEPTIONS

Demand for luxury tourism and hospitality is expected to grow faster than for any other industry segment. McKinsey research states, based on a survey of more than 5,000 luxury travelers. This growth is being powered in part by a sharp rise in the number of individuals globally with net worths between \$1 million and \$30 million. But it's also resulting from a large and expanding base of aspiring luxury travelers with net worths between \$100,000 and \$1 million, many of whom are younger and increasingly willing to spend larger shares of their wealth on upscale travel options.

THE RESPONDENT POOL
The respondent pool included travelers from five major, representative source markets: China, Germany, the United Arab Emirates, the United Kingdom, and the United States. All respondents took at least one leisure trip in the past two years. Findings from this survey, coupled with input from industry experts, suggest that some commonly held perceptions about luxury travelers might be due for reassessment. Perception one: All luxury travelers are very wealthy. Luxury means different things to travelers at different wealth levels. High-net-worth individuals (HNWIs), with assets ranging between \$1 million and \$5 million, tend to trust boutique travel agents, seek privacy and exclusivity, and favor exotic destinations. Very-high-net-worth individuals, with assets ranging between \$5 million and \$30 million, are relatively more likely to book large suites to preserve intimacy and tranquility, prefer end-to-end experiences steeped in local ambiance, and may be less focused on hotel brand names. Ultrahigh-net-worth individuals, with more than \$30 million in assets, prefer quiet luxury with personalized service, targeting remote, private destinations, accessible via private airports or helipads, that feature tailored experiences available nowhere else.

Aspiring luxury travelers
Aspiring luxury travelers have their own set of preferences. They might splurge on special occasions, prefer visibly branded luxury, demand value for their money, and pay close attention to loyalty program points and benefits. They might be willing to spend big on individual components of their travel—such as a helicopter tour or fine-dining experience—but not on every aspect of a trip. Aspiring luxury travelers often rely on branding to validate their sense that an experience is luxurious. Strong luxury-hospitality brands can explore creating entry-level offerings to engage with this segment. Existing luxury brands can also cross categories to capitalize on this segment. For instance, Bulgari entered the hotel space as part of a collaboration with the Ritz-Carlton Hotel - the luxury watchmaker is expected to

have a dozen collaboration-driven properties by 2026. Elle, the global lifestyle brand, has announced it will launch two hospitality ventures: Maison Elle and Elle Hotel. And high-end shoemaker Christian Louboutin opened a boutique hotel on Portugal's coast.

WHERE LUXURY TRAVELERS COME FROM AND PERCEPTIONS
The second perception is that luxury travelers come from Europe and the United States. Although North America is still home to the most millionaires, it could be overtaken by Asia by the mid-2030s, largely as a result

of growing wealth in China. The rapid growth of wealth in Asia is spurring a boom in regional hotel construction. A 2023 assessment of the global luxury-hotel pipeline found that 41 percent of hotel rooms in the pipeline are in Asia, with 43 percent of those in China. The luxury-hotel supply in Asia, both existing and in the pipeline, leans heavily toward larger properties, chains, and franchises, reflecting the industry landscape in Asia as well as a preference among Asian travelers for luxury brands they know and trust. Perception three: luxury travelers are old. While baby boomers do represent a significant portion of lu-

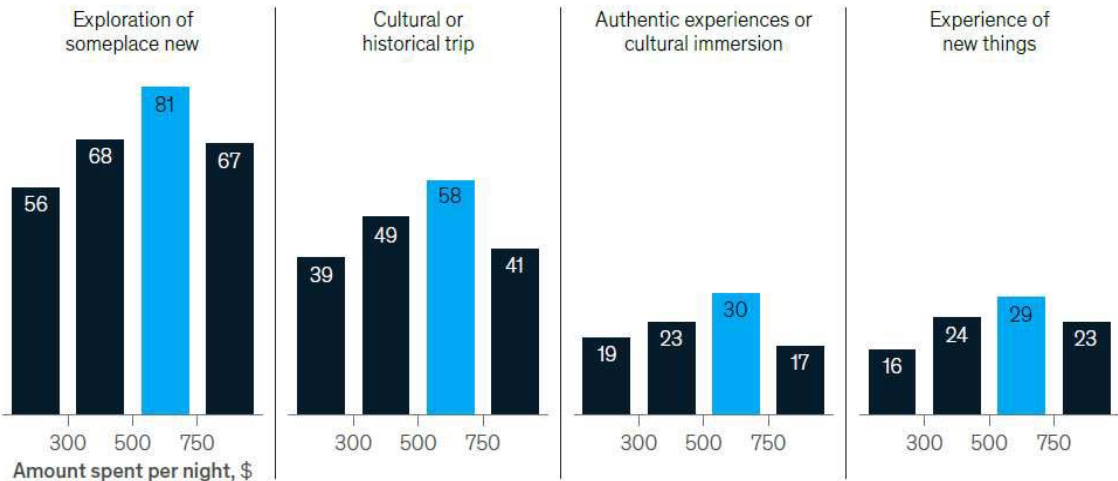
xury spending, 80 percent of the luxury leisure market is in fact made up of people below the age of 60. Luxury players might consider devising offerings that can appeal to both parents and teens. Multigenerational luxury travel involving grandparents, parents, and kids is a growing trend, and these families often prefer to book villas that offer privacy and space for large groups. People in their 20s make up a smaller share of the luxury market, but acquiring customers in this segment is still important. Perception four: luxury travelers all crave exotic experiences. It's true that luxury travelers are comparatively more likely

to go on exotic and adventure-focused vacations, such as yachting trips or safaris. This is unsurprising, given the higher costs of these types of outings. However, the largest share of luxury travelers still want to do the same kinds of things that other travelers do. Sixty-five percent of them express intent to go on sunny beach vacations, and 55 percent say they're planning to book relaxing getaways. Perception five: luxury travelers want 24/7 digital connection. It might seem intuitive that high earners who are likely to spend much of their working time communicating via phones and laptops would demand continued connectivity while away from home. But luxury travelers who responded to the survey are two to three times more likely than mass travelers to say their main reasons for traveling are to meet new people and to disconnect from digital devices. Perception six: luxury travelers don't care about loyalty programs. Sixty-eight percent of luxury travelers—compared with only 41 percent of mass travelers—say loyalty programs are an important factor when choosing accommodations. That said, many luxury travelers look for a different kind of reward from loyalty programs. They're less focused on accumulating points and redeeming them for free stays. They're more attuned to the recognition that comes with being a valued loyalty customer and with the attentive service. Perception seven: luxury tourists are done with resorts. All-inclusive resorts—replete with buffets, standardized drinks, and family-targeted activities—may not seem as if they would appeal to luxury travelers. The truth is that luxury travelers do still turn to all-inclusives for the ease, convenience, and wide variety of instantly accessible activities they can provide. But luxury travelers want these accommodations to feature exclusive offerings and personalization. Perception eight: luxury and scale don't mix. Historically, the luxury segment and the exclusivity it entails have been associated with independently owned, landmark hotels. But there are brands that have successfully scaled luxury accommodation, and there are many elements of scale that luxury players can benefit from. Perception nine: the traditional travel agent is dead. It's true that inspiration for the luxury segment has become deeply tied to social networks instead of travel agents. This doesn't mean, however, that there is no role left for travel agents to play. Luxury travelers continue to use travel agents instead of online platforms, in part because they simply want someone else to take care of the transactional booking details. Meanwhile, today's luxury travel agents - who prefer to call themselves travel advisors - are superpowered by technology and data that enable both a personalized touch and a robust, responsive level of back-end service.

Laura Dominici

The aspiring luxury traveler has distinct motivations from other travelers: they prioritize novelty, culture and history, and authentic experiences.

Motivations for leisure travel, by amount spent per night, % of respondents

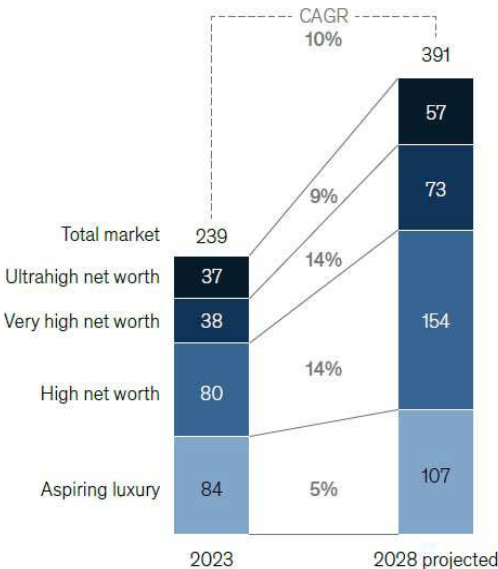


Note: Aspiring luxury traveler spends \$500-\$749 per night.
Source: McKinsey State of Tourism Survey, 5,061 travelers, Feb 27-Mar 11, 2024

Source: McKinsey

The luxury-hospitality market is large, and some segments are growing quickly.

Global spending on luxury leisure hospitality, by wealth segment,¹ \$ billion



¹As defined by Knight Frank, aspiring luxury traveler has \$100,000-\$1 million net worth, high-net-worth traveler has \$1 million-\$5 million net worth, very-high-net-worth traveler has \$5 million-\$30 million net worth, and ultrahigh-net-worth traveler has >\$30 million net worth.
Source: Capgemini; Credit Suisse; Knight Frank; Wealth-X; McKinsey analysis

Source: McKinsey

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THE FOCUS AT ECOLUXURY FAIR WILL BE ON THE 2026 EU DIRECTIVES

The major sustainability challenges that Ecoluxury Fair has always invested in relate to the new 2026 EU directives for this year's seventh edition. Enrico Ducrot, founder of the event, told us, "The four most important topics will be: certification; the alignment of the directive to the European tourism suppliers' industry by global suppliers; sustainable travel and products sold through the supply chain: travel agencies, tour operators, DMCs, carriers, cruises, and finally overtourism, specifically how Italian and European administrations, in general, are addressing this phenomenon." These, and other crucial topics for the future of the sector, will be covered during the Forum on the morning of November 7th. "The fair reconfirms pre- and post-event activities (Rome, Lazio, Umbria and Tuscany) and site inspections in luxury hotels in Rome," emphasises Ducrot.

A GROWING EVENT

The event is growing, with 160 buyers (agents from various countries including the United States, Great Britain, Denmark, Switzerland, Germany, Romania, Poland, Egypt, the United Arab Emirates, Nigeria and many others) and more than 100 exhibitors. Themed evenings are also planned to engage with the Collection owners and discuss new challenges for the coming years.

FROM SUSTAINABLE LUXURY TO OVERTOURISM

The world of sustainable luxury finds itself at a point in time where overtourism is being criticised and new rules are being sought to prevent tourist destinations becoming congested. How do we strike the right balance? "The issue of overtourism is one of many challenges in land management, and sustainability is deeply involved in and supportive of finding solutions to this emergency. It has been an emergency for some places for a long time and it cannot be postponed any longer. However, the issue is under the jurisdiction of the local administrations governing the area, where the contribution of businesses is important, but administrative policy must dictate the solutions," replies Ducrot. A speech by Alessandro Onorato, the councillor for tourism, major events and sports, is scheduled at the Forum, where he will present his view on this subject. "Hotels that combine luxury and sustainability," continues Ducrot, "have the responsibility to be observers of the present and the future in this transitional challenge, acting as real-life laboratories. These are huge, dynamic challenges, and the Ecoluxury Fair is the key event in the global tourism industry where these issues are addressed, especially by the industry's leading figures who discuss models applied in high-end sectors that, once tested, can be useful for introduction

into the mass market."

VIAGGI DELL'ELEFANTE TOURS

Examining Viaggi dell'Elefante's planning more closely, Enrico Ducrot, who is the owner and managing director, states: "Major tourism flows are excluding critical destinations, which also harms neighbouring areas such as the Middle East and countries bordering western Russia, with the exception of some places like Oman, Saudi Arabia, Egypt and Turkey, which are performing well, or Morocco and Algeria in North Africa. Viaggi dell'Elefante's top destinations in Asia are Japan, India, China, Indonesia, Vietnam, Cambodia and Uzbekistan. There are interesting surprises," he continues, "for South Korea, Mongolia and Bhutan. In Europe, we are seeing growth in Iceland and Scandinavia; in Central and South America it's Peru, Argentina and Cuba, while in Africa it's Tanzania and southern Africa.

Rwanda, Uganda and Mozambique remain niche but attract great interest. Australia and New Zealand are popular for honeymoons, and in-

clude Fiji and the Cook Islands. There is also strong demand for honeymoons in Japan, as well as India and Sri Lanka combined with the

Maldives. Expert-led tours have significantly expanded and this will continue throughout 2025."

Laura Dominici



IN AN INTERVIEW WITH MCKINSEY THE MAIN RULES FOR RESPONDING ADEQUATELY TO THE TARGET

UPCHURCH, VIRTUOSO: "DELIVERING BEYOND EXPECTATIONS"

In an interview with McKinsey, Matthew D. Upchurch, founder, chairman, and CEO of the luxury-travel advising network Virtuoso, said that "luxury is an overused word, and not just in travel. People might try to quantify it and define it according to spending amounts. But to me, it's more nuanced than that. Start with the traveler. We now have five generations of people all traveling at the same time. And each luxury traveler may have many distinct personas, which change based on their stage of life and what kind of trip they're taking. We need to look at things more holistically. The real differentiator is how the customer feels. A luxury experience often means finding someone who will truly listen to what you want and then deliver beyond expectations".

THE ROLE OF ADVISORS

Advisors can't possibly know every part of the world - they have a global network at their disposal for that. But having someone who specializes in you, who knows your likes and dislikes and exactly how you want to travel without you having to explain it every time you plan a trip - that's luxury, according to Upchurch. Perhaps the simplest definition of luxury from the customer's point of view is: "Of course I could do it myself. I don't want to.



And if I can have someone in my life who provides incredible experiences and is a fun collaborator, takes my input, has great connections, and can watch my back and do things for me, why would I want to do it myself?"

DESTINATION PICKS

In terms of destination picks or product picks among luxury travelers, Upchurch says: "With luxury experiential travelers, the fundamental creative tension is between the familiar and the unfamiliar. There's often the desire to go back to places they love and have built relationships with over time - to show them to family and friends and see them through new eyes. But people want to know before they return to a familiar destination: Is there a new story happening there?

Has the destination itself transformed so that it's familiar but still feels new? We're also seeing a strong desire to explore. That's one of the reasons expedition cruising is doing incredibly well. Expedition cruising is high end, not mass, and it's absolutely bringing new luxury travelers to cruising". Sophisticated travelers don't want to be caught in an overcrowded major city in Europe in the summer, so either they'll visit in September or October, or they'll focus on secondary or tertiary cities instead. Finally, Upchurch gives an advice to luxury-accommodation providers: "First, they need to get really good at being able to measure what's not easily measurable. Second, focus on staff culture. It's crucial to engage with your employees and understand them. We need to make

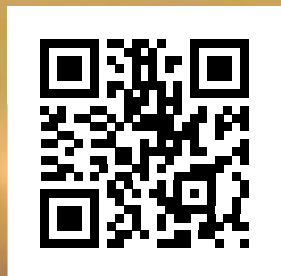
sure the people delivering the experiences feel fulfilled. I absolutely believe that those hospitality players that really focus on their employees, their culture, their service levels are the ones that will excel". As for the kind of evolution in the way luxury travelers engage with travel advisors, the manager comments: "If you go back to the middle of the 20th century, more people booked directly with the actual providers than they do today. International flights were a high-end product. There was pleasure in it. There was also very little pricing complexity because there were essentially just four fare classes. So why would people use a travel advisor if a lot of providers had fabulous service and there was no price complexity? They did it for the same core reasons that they do it today. One is community knowledge: travel advisors have the collective knowledge of the community that they serve. They know what's on the minds of other high-net-worth individuals that the customer respects. Another is the value of relationships. The successful luxurytravel advisor needs more of a right-brain attitude, asking the customer open-ended questions. Any good travel advisor today will add value in three separate areas: before the trip, during the trip, and after the trip".

L.D.

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PRAISE FOR SUSTAINABILITY COMES THROUGH NEW DISCOVERIES

As 2025 approaches, **The Residence by Cenizaro** highlights emerging visitor trends who, as we know, are increasingly seeking and exploring innovative ways to experience destinations.

EXPERIENTIAL TRAVEL AND WELLNESS RETREATS

There is a growing focus on immersive experiences that foster a deeper connection with the local area. The Residence Zanzibar, for example, prepares engaging, experiential tours, including a special visit to Stone Town or a stop at Prison Island, known for its population of Aldabra giant tortoises. The Residence Maldives offers holistic wellness trips ranging from two to seven days, including an anti-ageing experience that rejuvenates body and mind, or the Vigour & Vitality retreat designed to improve physical well-being and alleviate daily stresses, starting with a body composition analysis and a personalised training session.

FOCUS ON FOOD

Many tourists are now choosing destinations to search for the perfect dish and enjoy authentic gastronomic experiences. The Residence Maldives invites guests to

discover its Earth Basket, where they can explore the surrounding areas through a tour of the nursery and organic garden. Here they learn about composting and the health properties of the garden's aromatic herbs. Guests can also harvest garden products to then take part in a food

workshop where they taste the fruits of their labour at the Earth Table.

NATURE GETAWAYS

The Earth Basket initiative takes place in most of The Residence by Cenizaro properties. It is an on-site culinary garden,

open all year, where Ayurvedic plants are grown on once degraded land to be used in healthy, rejuvenating drinks. The plants are also used with homemade virgin coconut oil for Spa treatments. Guided by each resort's Green Committee, all products are grown without pesticides and

the resort's food waste is converted into compost to use in the garden. The Earth Basket program also includes farm workshops, culinary masterclasses with the hotel chef and packages designed to teach guests about sustainable living.

Alessandra Tesan



Ddò Relais was born from the careful recovery of a Lamia of the early twentieth century: the integrity of the places was preserved and a new look was given to the spaces originally used as agricultural warehouses and shelter for animals.

The 5 rooms (La Bicocca, Il Fico, Il Cellaio and L'Angolo + the Deluxe Il Forno, created from the restoration of the ancient stone oven) are treated in details, with furnishings made to an original design and equipped with all contemporary comforts.

Almost five hectares of countryside surround the property where guests have access to the swimming pool and solarium, the patio where breakfast is served, the Spa with the wellness program, the suggestive outdoor fireplace, the lawns and the roof terrace, furnished like an open air lounge to watch the stars.

Attention to the environment has guided our choices: in the car parks of the Relais and the Villa there are charging stations for electric vehicles, in the bathrooms we offer biodegradable soaps in glass dispensers and we are committed to limiting the use of plastic.

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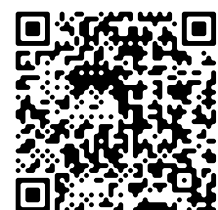
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HIGH-END HOSPITALITY IS INCREASINGLY A LUXURY GOOD



Four hundred million. That is the current number of high-end consumers, and it is set to grow. The estimate is that it will rise to "500 million by 2030," says Matteo Bruno Lunelli, president of the Altgamma Foundation, which brings together first-class Italian brands from various sectors, including fashion, design, yachting, automotive, jewellery and hospitality. Numbers show that the high-end luxury sector has experienced "a strong rebound post-pandemic. In 2023, it grew by almost double digits, with luxury hospitality up 15% and luxury goods growing by 4%. In 2022, the numbers were even stronger," Lunelli notes.

CONSUMERS WANT EXPERIENCES
It's no surprise that growth has slowed slightly today. The numbers Altgamma developed with Bain & Company to create the monitor for global luxury goods markets, reveal a scenario of "between 0 and 4%, where zero represents a stable market throughout the year," which Lunelli considers "the most accurate forecast to give right now." There are some brands performing positively, while others are facing negative trends. This variation also occurs across sectors, but the good news is that, in this scenario, the strongest performing sector is "experiential luxury," according to Lunelli. This is further proof that consumers have "an increasing desire for experiences," which they sometimes prioritise over purchasing personal luxury goods. The expectation, according to Lunelli, is that in the luxury market, the experiential sector could perform better than the personal luxury goods sector. "During great economic uncertainty, the higher-end market is the most resilient. Luxury hospitality is best positioned to weather a period

where consumers are feeling the pinch of inflation." The outlook is clear: after a positive period, "we are now in a moment of slowdown, but with an optimistic view of the future." And the prospects for experiential luxury are very promising.

THE IMPACT OF HIGH-END TOURISM
There is no doubt that high-end luxury in Italy can be "a driving force for our economy, just as high-end tourism is a strategic lever for the development of Made in Italy and the country's economy," states Lunelli. A study conducted during the pandemic on high-end tourism revealed that its size in Italy (depending on whether you look at number of nights or accommodation facilities) is "between 1% and 3%. High-end hotels tend to be larger, so we estimate that it accounts for about 2% of total tourism." High-end tourism represents "25% of the total tourism-related contribution to the Italian economy." To give a clearer picture of the value of the sector, Lunelli adds that, "a high-end tourist spends about nine times the average in the local area on services provided, not only by the hotel itself, but also by the surrounding community, and a high-end hotel employs about twice the number of staff as the average." This has a significant multiplier effect. In Italy, there are "wonderful accommodation facilities, but we need to continue moving in this direction because many areas still lack high-end hospitality facilities."

MELPIGNANO'S VISION
"2024 is a year of consolidation." Aldo Melpignano, founder and CEO of Egnazia Ospitalità Italiana and vice president of the Altgamma Foundation with a focus on hospitality, is certain of this. He confirms

that there has been "very strong growth in the past couple of years." As far as high-end hotels are concerned, Melpignano maintains that perception and context are increasingly "aligned with the luxury segment. In recent years, there has been significant crossover between hospitality and fashion for example," and there have also been "financial deals that have brought major hospitality brands into luxury conglomerates." This crossover has also affected marketing, sales and how hotels are sold, drawing inspiration "from sectors stronger than ours." At the same time Melpignano observes that "the strength of hospitality, client management and guest experience is becoming increasingly

important in high-end segments." The result is that "high-end hospitality is increasingly considered a luxury good and no longer just a slice of the hospitality industry." The key trend to watch is a world increasingly moving towards "well-

being, and focusing on the impact that experiences have on people." There is a growing emphasis on "customisation," Melpignano concludes, offering a suggestion: "Standardising processes is fine, but it no longer works for experiences." S. V.

The high-end tourism market in Italy	
High-end international tourists spending	€ 25 billions
Accommodation	€ 7 billions
Eating out	€ 2 billions
Visits, excursions, shopping	€ 15 billions
Spending for hotels - Luxury tourists vs average visitors	900%
Contribution of high-end tourism to Italian economy	€ 60 billions
Fonte: Altgamma	

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THE ANSWER IS TO DARE

Luxury sometimes needs to dare, not just innovate. This is the path Ginori 1735 has taken, as Alain Prost, president and CEO of Ginori 1735, a member of Altgamma that also organises hospitality projects, explains. The hospitality segment — particularly luxury hospitality — represents more than a third of the company's revenue. As the manager observes, it all starts with today's consumers who are looking for "extraordinary experiences they are willing to pay a premium for, to enjoy original, exclusive,

exciting moments. In my opinion," he says, "there's a huge growth opportunity if you manage to create a unique experience." The company's response to this trend is to offer lifestyle experiences. In this context, the brand has designed terraces in collaboration with luxury hotels, or, as in New York, "the first Ginori Café." This move leverages multiple factors, "experience, exclusivity and engagement with our partners, with very positive results," Prost comments. In his view, if we follow the path of "disruptive experiences that bring something new

to the market, the prospects for luxury hospitality are excellent." The Ginori Café is a step in this direction. It is a comprehensive project that allowed the company to dare to do something it never would have imagined a few years ago. "We studied food, we became architects, we worked with the design team, and we collaborated with chefs on the menus, all to surprise people and offer them something different. The belief was that we needed to dare, and for me, that is a necessary response."

Stefania Vicini



Con il patrocinio di



Regione
Lombardia

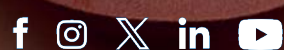


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FIERA MILANO

FIVE FRONTIERS FOR LUXURY HOSPITALITY

The hospitality sector has reckoned with a post-pandemic reality that has shifted various dynamics. *"It has brought changes in how hotels are managed, difficulties such as recruiting staff, more competition with new hotel openings, and many unknowns, but it has also brought numerous opportunities that need to be seized,"* says Ezio Indiani, general manager of Hotel Principe di Savoia in Milan. This is the background for a review of five luxury hospitality businesses, exploring how they excel in their day-to-day operations. These challenges are new openings, recruiting talent, establishing a foothold in saturated markets, motivating and valuing staff and differentiating from competitors.

A CHALLENGE BECOMES AN OPPORTUNITY

Davide Bertilaccio, CEO of Villa d'Este Hotels, likes to see these challenges as opportunities. *"The post-pandemic phase has given us the chance to work on endless opportunities,"* he notes. *"I see challenges as opportunities for im-*

provement. Until now, one of the biggest issues in the sector has been staffing." This led to choosing to invest part of their team in creating a hospitality campus, *"to provide growth opportunities and establish a welfare system. I strongly believe in staff training,"* he says. *"Strength lies in finding the right motivations and new recruits."* The challenge for Piero Magrino, general manager of Borgo Pignano Florence, is a project he has been following which will launch in Florence in 2026. *"The challenge is to complete the project, which has faced delays due to constraints from city regulations. We've had to adapt the interior design, and what we initially envisioned has been reworked. Now, we're scheduling the steps to launch in Florence, which already boasts an excellent luxury hotel scene."*

COMPETITION AND DIFFERENTIATION

As competition intensifies in cities, Orient Express Group remains unphased, responding with the opening of two new properties: Hotel La Minerva in Rome and Palazzo Donà Giovanelli in Venice. Giampaolo Ottazzi, area ge-



neral manager for Orient Express Hotels Italy, acknowledges that *"competition in Rome is becoming fierce and with 50 five-star hotels now in the city, it's not easy to carve out a space. We don't sell rooms, we sell experiences, dreams, guest experiences,"* he states, underscoring the importance of personalisation. Recruiting the right talent is also crucial. *"We're actively recruiting,"* says Ottazzi, who is inspired by his past experience. *"When I was training, I had mentors who passed on their knowledge to me, and that's why I look for people who want to teach the craft to the younger generation."* The opening of a hotel is an enormous opportunity, and for the manager *"the satisfaction of finding the right people is like fitting the pieces of a puzzle together. Rome is a difficult challenge, but not impossible,"* he says. In the search for staff, welfare elements come into play, *"to ensure a good work-life balance, to have more motivated people who earn a fair salary."*

Sofia Peluso, general manager of Villa San Michele, A Belmond Hotel Florence, enjoys the challenge in *"how we can diversify and find elements that make people talk about us."* This translates into offering, *"experiences that enrich our guests' stay such as morning yoga classes, calligraphy courses or city experiences, and giving a different slant on things to offer something extra."* This is the wellness philosophy. Similarly, at JW Marriott Venice Resort & Spa, the key word is well-being. General Manager, Cristiano Cabutti, emphasises *"360° well-being, an all-encompassing experience for our guests."* This includes a connection with the surrounding environment, *"of 104 olive trees, a vegetable garden and green spaces for recreational activities that contribute to well-being, from the kitchen to the spa."*

FOCUS ON HUMAN RESOURCES
Motivating staff is another key focus area, which is seen as pivotal to a com-

pany's success. Bertilaccio agrees, saying *"It's important, but it is a very complex aspect."* He believes, *"a key to a breakthrough is engagement: sharing goals at every level involves everyone, and the success of a company belongs to everyone."* Knowing how to delegate, but with responsibility. This view is echoed by Peluso. *"It's a challenge that we all share; we have the responsibility to shape future generations, so we must talk to people and listen to them. We have a responsibility to create a system not only when it comes to staff, but also regarding sustainability."* Cabutti delves into specific measures taken such as *"reviewing salaries and assessing where we lagged behind competitors. We worked on work-life balance, improved shuttle frequency since we are on a private island, upgraded staff housing services, and next year will be launching an Academy that grants participation certificates, which will add value to staff resumes."*

Stefania Vicini



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PRIVATE AVIATION: LUXURY, BUSINESS TRAVEL AND SUSTAINABILITY

When we think about private aviation, we usually think about celebrities and VIPs. Whilst this may be true, private flights aren't just for the wealthy, they also appeal to business travellers. The wide variety of aircraft available today can offer significant advantages over commercial flights at competitive prices. These smaller jets provide greater flexibility, faster travel times and a more tailored experience.

COMMERCIAL SOLUTIONS
The global market offers various options such as jet cards and membership programs, which allow customers to purchase flight hours. Another option is fractional ownership, where individuals buy shares of an aircraft. Passengers can also share a private jet by purchasing a single seat. Some operators also offer "empty leg" flights, flights where the aircraft travels without any passengers, either returning to its base or heading to another location to pick up clients.

A GROWING SECTOR
The business jet market is projected to grow from \$95.8 billion in 2024 to \$156.99 billion by 2032, with a CAGR of 6.4% (source: Business Jet Market). Manufacturers are increasingly focusing on developing aircraft with a reduced carbon footprint, which involves adopting sustainable aviation fuels (SAF) and integrating cutting-edge technologies that enhance fuel efficiency. This move towards sustainability and the growing demand for more eco-friendly solutions are driving market expansion.

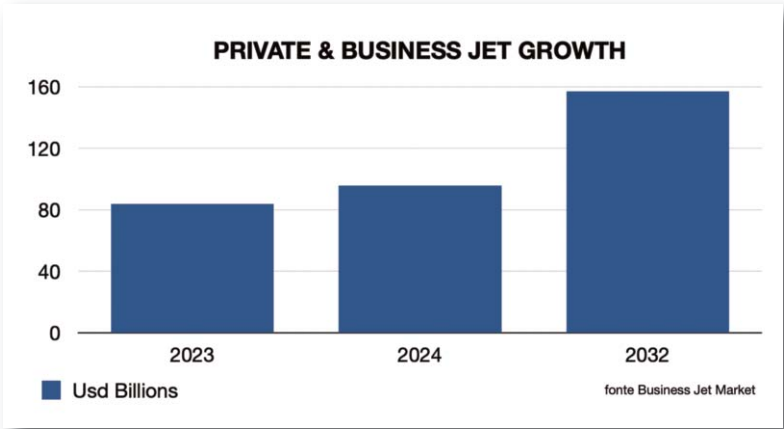
COST OPTIMISATION
Rising fuel costs, international regulations and increased awareness of environmental issues have pushed sales of fuel-efficient aircraft. Hybrid-electric propulsion is emerging as a promising technology for decarbonisation in the private aviation sector. According to the 2022 white paper by the International Council on Clean Transportation, by 2030 electric aircraft could reduce carbon emissions by 49-82% compared to traditional fossil fuel-powered alternatives, with further reduc-

tions of 57-88% by 2050.

OPPORTUNITIES OFFERED BY SAF
The introduction of SAF presents a significant opportunity for the business jet market. SAF is produced from materials that emit 80% less CO2 compared to traditional fuels and requires minimal modifications to aircraft engines

and existing fuel systems. With the International Air Transport Association committed to achieving net-zero emissions by 2050, incorporating SAF could position the business jet market at the forefront of eco-friendly air travel, shifting the focus from conventional jets to sustainable aviation solutions.

Paola Olivari



ForwardKeys predictions

According to predictive analytics from ForwardKeys, which monitors global air travel flows, international arrivals in Italy between October and December 2024 are expected to rise by 17% compared to 2019 (pre-pandemic levels). However, the most notable data concerns premium class bookings (first, business,

premium economy), which have seen a substantial increase of 43%, compared to a more modest +13% for economy class. This indicates that travellers with higher spending power will increasingly drive the growth of international arrivals to Italy.

Francesca Motta

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THE LUXURY OF INDEPENDENCE



The concept of luxury in independent accommodation facilities is about uniqueness, family stories, and, in some cases, the idea of home becoming the signature style and philosophical foundation. Independence is expressed through pride in themselves and sharing their story with guests through their properties. These values characterise two Italian hospitality brands: Collezione Em, with its five properties, and Il San Pietro di Positano.

A COMMON THREAD

The story of **Collezione Em** began 33 years ago. As **Sara Maestrelli**, co-owner of the chain, recounts, it was her grandfather who wrote the first chapter by buying the Grand Hotel Minerva in Florence. Later, her aunt took her first steps into hospitality, turning this passion into her career and her life. It was this passion that presumably sparked the idea for Collezione Em. She wanted to create a home in Forte dei Marmi, the summer vacation spot for Florentine families, "to

recreate the conviviality of our beach house, a place where friends and guests from all over the world could come to experience that authenticity," Maestrelli explains. This vision came to life with Villa Roma Imperiale, with its 31 rooms where guests from all over the world stay for "a month and a half, two months, two and a half months—it's their beach house." The next steps saw the addition of the Hotel Brunelleschi in Florence and, in December 2023, the opening of Violino d'Oro in Venice, which Maestrelli calls "my great love, our home on the lagoon." Although she acknowledges that the term "home" is often overused, she feels justified in using it here since she actually lives in the property, changing rooms every night to ensure everything is running smoothly. In 2025 there will be another step forward with the reopening of Pensione America in Forte dei Marmi, "perhaps the most important piece of hospitality history in Forte," she emphasises. "This is what Collezione Em is about: homes with fa-

milies inside. "The goal is to provide guests with "authentic, profound experiences in places that are a part of us, and that we love." For her, the concept of luxury is embodied in "the people," three types specifically: "The artisans who build our homes one piece at a time, the people who are the lifeblood of the properties, and our guests, who come from all over the world and choose to live in our homes, bringing their own stories." Stories that intertwine. If luxury is about seeking something unique and rare, then for Maestrelli, their luxury "is exactly that."

This common thread connects Collezione Em with **Il San Pietro di Positano**, where the core idea is to make guests feel at home, with a team that loves the property. **General manager Andrea Zana** describes the formula: a family story, spanning three generations, with the fourth currently growing up. The team consists of 188 employees for 55 rooms, "with an incredibly low turnover rate of 5%, which shows that employees are happy. This year, 40% of our guests were repeat visitors, who come back year after year and rebook before they leave. We celebrated 1,200 room nights with a single guest, and there are many such stories," he notes. And what about luxury? It shouldn't be ostentatious but "gentle, whispered, made up of stories and interactions with staff."

A CONNECTION TO THE LOCAL AREA

Luxury rooted in the local area and celebrated through its artisans: this is the formula adopted by Collezione Em, whose properties are 100% made in Italy. Each one reflects a lifestyle because, as Maestrelli explains, "what's important is offering guests the opportunity for a genuine experience."

At **Il San Pietro di Positano**, the local

area is experienced through the employees, who "are the custodians of the Amalfi Coast's traditions," says Zana. The region is rich in culture, wine and food, which guests want to experience through "the eyes and words of those who live it every day."

GOING SOLO

The influx of foreign capital into Italian hospitality doesn't seem to have affected these two family businesses, who have no intention of selling. "There is no plan to sell to foreign companies. The fourth generation is growing up," Zana confirms. "Il San Pietro in Positano will always remain independent, and we will do everything we can to protect our brand," he says resolutely. The strategy is to value "all the parts involved within the property, starting with the employees."

Maestrelli is on the same page. There is no plan to sell here either. "Our properties are deeply connected to us," she says. "External investments can be positive when aiming for rapid expansion, but we want to expand more carefully, giving each new opening time to grow. We're moving slowly on our own, for now."

Stefania Vicini

Collezione Em	
Grand Hotel Minerva Firenze	97 rooms
Hotel Brunelleschi Firenze	96 rooms e suites
Villa Roma Imperiale Forte dei Marmi	31 rooms
Violino d'Oro Venezia	32 rooms
Pensione America Forte dei Marmi	18 Junior suites & suites, adults only
Source: Collezione Em	

Il San Pietro di Positano	
Rooms	55
Employees	188
Turn over	5%
Source: Il San Pietro di Positano	



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The Gulf States: the new luxury frontiers

The concept of luxury in the Gulf states has undergone a significant transformation in recent years. While it used to be synonymous with extravagance and opulence, today it has taken on a new meaning, linked to sustainability and an awareness that the built environment shouldn't threaten the natural one. It is no longer just about buildings that push the limits of architecture but about offering experiences that respect the planet, even when budgets are limitless. The real challenge now is not to have the most eye-catching hotel but to develop accommodation facilities that integrate harmoniously with the environment. This new kind of luxury, made up of eco-friendly materials, green technologies and sustainable design, is redefining expectations in the high-end hospitality sector.

ICONIC EXAMPLES

One of the most iconic examples of this trend is the Jumeirah Marsa Al Arab in Dubai, designed as a futuristic superyacht by architect Shaun Killa. The opening of this resort will complete Jumeirah's "oceanic trilogy," which includes the famous Jumeirah Beach Hotel and the Burj Al Arab. Its futuristic design blends with innovative solutions to reduce its environmental impact, pro-

ving that the future of luxury is sustainable. Another highly anticipated opening in Dubai is the Six Senses The Palm, which is set to launch this winter. Located on Palm Jumeirah, the resort offers 61 rooms and 162 residences, along with a wide range of wellness services. In Oman, the opening of the St. Regis Al Mouj Muscat Resort has caught the attention of lovers of discrete, refined luxury. Located in a developing residential area, the hotel offers a perfect mix of modern elegance and respect for the surrounding environment. The recently inaugurated Mandarin Oriental Muscat is also a new address to consider for upmarket clientèle.

A particularly innovative project is Dar Tantora The House Hotel, which opened its doors last May in AlUla,

Saudi Arabia. This boutique hotel with 30 rooms offers a unique experience, blending luxury comfort and tradition, and was in fact built using architectural techniques from the 12th-century.

Qatar is also making its mark in this area with new openings such as Our Habitas Ras Abrouq, located in a nature reserve, and the Rixos Premium Qetaifan Island North, which opened at the beginning of 2024. In Ras Al Khaimah, upcoming openings include the Le Méridien Al Marjan Island Resort & Spa and the Hilton Marjan Island Beach Resort & Spa, both scheduled for 2026, followed by the Nobu Hotel and W Al Marjan Island, both expected in 2027.

Francesca Motta



Sustainable, authentic luxury by Originaltour

When it comes to Originaltour and luxury, an important point must be highlighted: this tour operator focuses heavily on tailor-made experiences and is therefore able to design luxury proposals for all its destinations.

KEYWORD: EXCLUSIVITY

High-end clientele turn to this tour operator for carefully curated services and meticulously selected hotels. For example, Oman is one of Originaltour's key destinations, so the Luxury Oman Tour itinerary, which launched last year, deserves a mention. It offers high-end services such as exclusive spa treatments and refined gourmet cuisine. Its accommodation facilities have their own stories to tell, from the Anantara Resort & Spa, one of the world's highest luxury resorts perched on Jabal Akhdar, the Green Mountain, that offers breathtaking canyon views from every room, to luxury tents in the deserts of Wahiba Sands and Ras Al Jinz.

TAPPING INTO EMERGING TRENDS

"Luxury is undoubtedly a growing target that is acting as a catalyst for our work, and we are committed to offering more high-level itineraries in the near future,"

states Loredana Arcangeli, General Manager of Originaltour. "Sustainability is a trend across the board in this segment, which is why we've created an Eco Oman tour, offering unique experiences such as staying in restored Omani homes, where visitors can rediscover the country's authenticity. We receive many requests for stays in other destinations in pristine, secluded locations such as the islands of Micronesia, which is another one of our areas."

FORECASTS

The operator estimates a 10% growth by the end of 2024, with particularly positive expectations for the coming months. "We have launched several Christmas and New Year itineraries in Oman, Vietnam and Cambodia, some of which are already fully booked," says Loredana Arcangeli. "Beyond the holidays, our planning continues to include itineraries in Oman (30 listed online alone), the Emirates, the Far East, the Indian Ocean and the Pacific islands. We are also seeing excellent results from incentive trips, and there is continued, significant interest in honeymoons and diving trips."

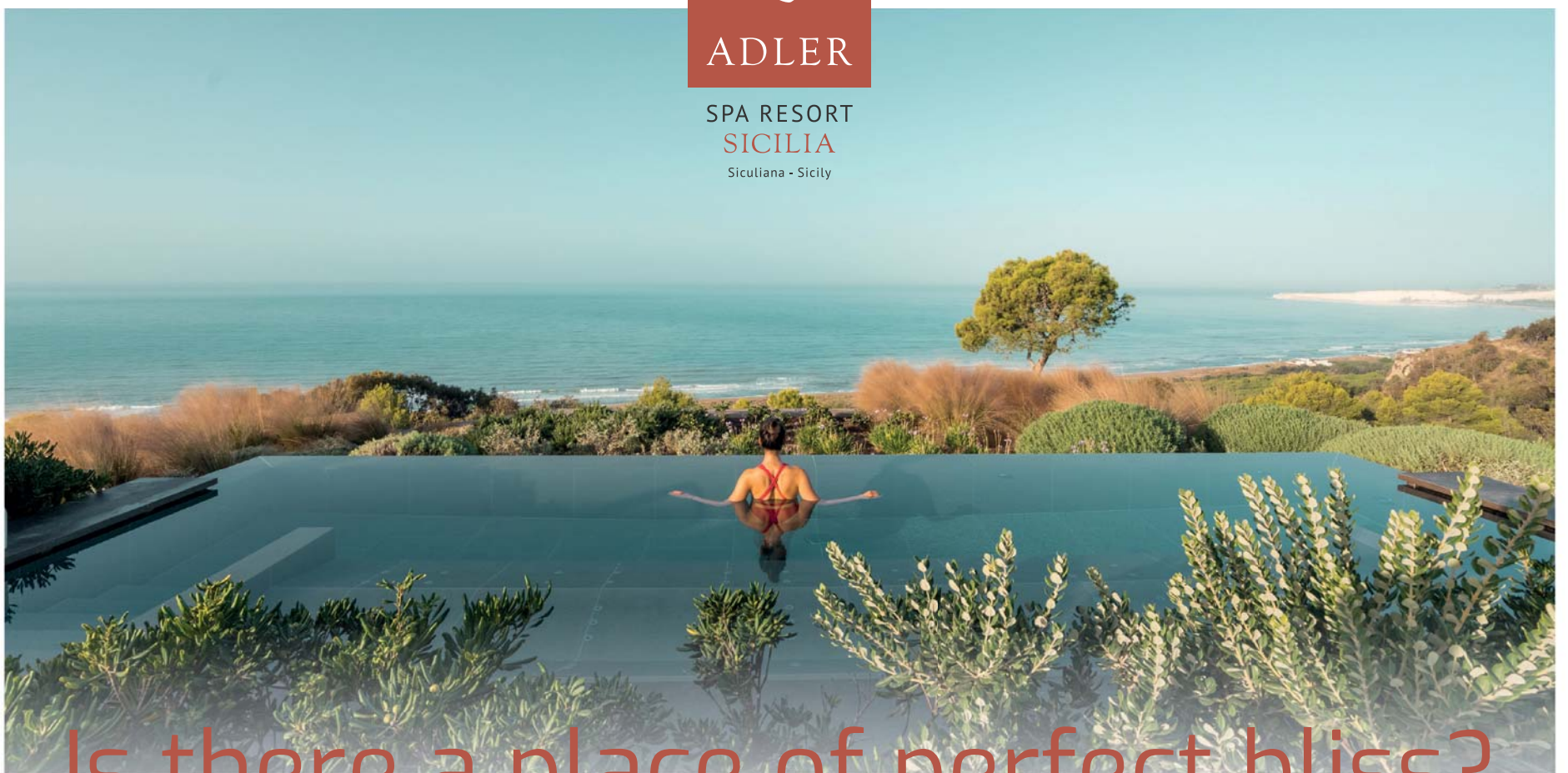
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NDC, LA DISTRIBUZIONE TRA SFIDE E OPPORTUNITÀ

Avere in un'unica piattaforma tutte le informazioni e le operazioni di vendita per fornire non soltanto il "searchand book" ma anche il post vendita. È l'ambizione del protocollo Ndc e il sogno del trade alle prese con il modello distributivo che, nelle intenzioni di Iata, dovrebbe raggiungere il 30% di segmenti venduti su Ndc entro il 2025. Tenendo conto che attualmente lo share ha superato il 10% si tratta di un bel balzo in avanti.

Se ne è parlato recentemente a Milano in occasione della round table del ciclo MARTEDITurismo organizzata da Guida Viaggi in collaborazione con Amadeus Italia dal titolo "Ndc un anno dopo: l'evoluzione all'interno della travel industry in Italia".

INTERPRETAZIONI DIFFERENTI

Il tavolo ha messo insieme diversi "motori di business" e se da un lato permane la perplessità sul modello distributivo, dall'altro ogni compagnia aerea ha fatto sua una interpretazione individuale del fenomeno, modulata da strategie commerciali e politiche distributive.

"Rispetto a quanto emerso sul tema nel corso della tavola rotonda dello scorso anno - ha commentato **Gabriele Rispoli, commercial director and board member di Amadeus Italia** dopo aver sottoposto un breve sondaggio sull'adozione del protocollo ai partecipanti - si evince che la percentuale di chi afferma di aver accelerato e chi si ritiene in fase di crociera è dell'88%. Come Amadeus quest'anno ci siamo concentrati sul-

l'end-to-end. I vettori presenti in piattaforma sono passati da 23 a 28, con una progressione più lenta rispetto all'inizio per potersi concentrare sulle funzionalità e renderle compatibili con i vari modelli di business, dall'identificazione dei segmenti corporate all'inserimento di volo, hotel e auto a noleggio e nei prossimi mesi se ne aggiungeranno altre. Si tratta di opzioni di acquisto diverse e customizzate per passeggero, dal leisure al corporate, per target famiglie o persone singole. Nei numeri si sono aggiunte 500 funzionalità nuove e per il 2025 assisteremo a un'accelerazione importante, anche a livello di strategie commerciali. Stiamo approcciando anche l'intelligenza artificiale generativa".

SOLUZIONI END-TO-END

"Nell'ultimo anno - conferma **Fabio Andaloro, sales director Italy Malta & Albania di Air France-Klm** - abbiamo avuto un forte sviluppo soprattutto sull'after sales e sull'end-to-end. Amadeus è stato un partner chiave ma abbiamo lavorato con altri Gds e 17 aggregatori e lanciato dei supporti in house, per esempio, oltre al call center, che avevamo già, una chat 24/7 dedicata all'Ndc".

"Quando parliamo di estensione after sales - prosegue - ci riferiamo alla possibilità di fare rimborsi, cosa che l'anno scorso non si poteva fare, e void, per fare alcuni esempi, quindi la possibilità di gestire totalmente questi Pnr. Abbiamo lavorato sulle ancillary, la cui crescita del fatturato è stata importante. L'aumento delle connessioni Ndc è stato enorme, con più 30%. Come

“Ndc un anno dopo: l'evoluzione all'interno della travel industry in Italia

adoption rate in Italia siamo sotto il 50% con due digit, relativamente alto. Poi ci sono realtà dove abbiamo il 100 o il 90% e altre con il 2, dipende dal segmento e dalla modalità del partner". "Parleremo molto di più di Ndc alle aziende - garantisce **Andaloro** -. La tecnologia c'è così come la resistenza al cambiamento. Ci sono situazioni e modelli distributivi ed economici che vanno cambiati. Significa tempo e investimento da parte di tutta la filiera".

MULTICANALITÀ INEVITABILE

Per **Adriano Apicella, a.d. Welcome Travel Group**, "oggi Ndc è un male necessario, non riesco a vedere il vantaggio che dovrebbe essere insito nel motivo del lancio. Oggi dà opportunità sulla carta, il mondo delle ancillary è sofisticato e non c'è nel protocollo così come era stato presentato. Combattiamo per emettere void e rimborsare e non c'è completezza di contenuto. Usando Ndc investo, perdo in produttività e ho più persone al lavoro". È un fiume in piena **Apicella**, che punta il dito sul fatto che "anziché avere un'unica piattaforma ci vogliono i Gds, Travelfusion e altri canali ancora per poter avere più contenuto. Ora non esiste più il full content e per giunta i vettori non sono pronti a questo passo tecnologico".

Il risultato è che per la distribuzione occorrono più investimenti e con meno margini, anche se, secondo **Fabio Andaloro di Air France-Klm**, avere più distributori tecnologici dà più garanzie in termini di trasparenza e prezzi.

Poi l'accento di **Apicella** alla news di attualità: "Turkish esce da Sabre ed è folle che un contenuto aereo non sia distribuito da un Gds. Potrebbe essere un pericoloso precedente".

INTEGRAZIONE DELLE FUNZIONALITÀ **Rispoli** ammette che "il full content non esiste più come prima, ma bisogna riconoscere che i contratti dei Gds con le compagnie aeree sono diversi e si tratta di capire quale livello di integrazione è stato scelto. Per quanto riguarda Amadeus, sono state integrate molte funzionalità per andare incontro alle necessità del trade e del consumatore. Sicuramente è un lavoro intenso e rispecchia la complessità dell'industry, che porterà ancora per anni al modello ibrido".

CHIAMATI A INVESTIRE

Alfredo Pezzani, chief business officer di ACI blueteam, lo dice chiaramente: "Le compagnie hanno messo

in atto il protocollo per massimizzare i profitti, non è stato fatto per far viaggiare più gente. Noi player della distribuzione abbiamo il compito di fare da regolatori e dovremmo agire come soggetto imparziale e questa prerogativa andrebbe meglio riconosciuta. Il fatto è che siamo chiamati a investire per agevolare i processi ma qualcuno dovrà pagare il prezzo".

MANCANZA DI STANDARDIZZAZIONE

Per quanto riguarda la fase di maturità di Ndc "è legata ai servizi - dichiara **Damiano Sabatino, chief operation officer di Uvet Group** -. Ciò che è grave è la mancanza di standardizzazione, purtroppo è stato immesso sul mercato un prodotto non completo, ma detto questo Ndc è tecnologicamente ineluttabile. A livello di user experience l'industria del travel è rimasta indietro e l'adozione di tecnologie innovative (Api) sono un dato di fatto delle altre industrie. Poi la politica commerciale è un'altra cosa, ma nel marketplace moderno la multicanalità è inevitabile. Dal nostro punto di vista siamo in fase di ricognizione. Per noi gestire le release di Api è oneroso e preferiamo usare i self booking tool".

MOLTE CONNESSIONI

Per **Luigi Deli, ceo di Fly4You** non ci sono dubbi: "Va cambiato drasticamente il modello distributivo. Tutti gli strumenti che spingono a portare ancillary sono i benvenuti. Nel 2010 c'erano 5 connessioni, oggi in una banca letto ne abbiamo 70. Bisogna avere tante connessioni e considerare che le software house mondiali e i Gds avranno un potere enorme. Oggi - aggiunge facendo il suo caso - il 30% dei voli li compro tramite canali non Gds. Questo cambio ha fatto mettere le gambe ai seggiolini aerei". Poi Deli trasferisce il discorso sul campo alberghiero: "Marriott ha perso il controllo della filiera distributiva, lo stesso accade nella distribuzione aerea. Io mi sto preparando".

NESSUNA FORZATURA

"Ci siamo rivolti ad Amadeus - spiega **Angelo Bartolini, sales manager Leisure Southern Europe di Qatar Airways** - ritenendo necessario fosse un Gds il provider del nostro Ndc. Siamo in una fase interlocutoria, perché, volendo avere un trade friendly approach, non vogliamo forzare l'introduzione di Ndc su larga scala finché molte tematiche di servicing non siano risolte. Certo ci serve supporto sulle poche ancillary a nostra disposizione per cercare di spingerle. L'unica cosa che abbiamo introdotto per i partner che iniziano a testare il nostro Ndc è un dynamic pricing, più che un continuous pricing, senza fee e con livelli di scontistica bassi che non vanno a penalizzare la vendita via Gds".

"Il nostro obiettivo è capire le varie funzionalità sviluppate e da lì iniziare a dialogare sull'aspetto commerciale. Il business vero si fa in due, se lo si fa da una sola parte sul lungo tempo non paga. Immagino un agente di viaggi che al cliente mostra la business class di Qatar Airways attraverso il nostro metaverso. Questo ritengo dovrebbe essere il futuro della vendita, con altri canali non possibile".

"Il cliente è di tutti - aggiunge **Bartolini**, e avverte "non bisogna generalizzare. Ogni compagnia ha una propria struttura e strategia".

CRITICITÀ NELLA DISPERSIONE

Secondo **Luca Buonpensiere, ceo di Glamour Tour Operator**, "Ndc è come un figlio che ci siamo trovati e che ora stiamo cercando di fare crescere correggendolo un po'. La mia è una critica sulla genesi iniziale, che ritengo basata sulla volontà di risparmio. Siamo dall'altra parte rispetto ai vettori, ma come distributori abbiamo un peso specifico che non va sottovalutato. Il dialogo dovrebbe essere alla base del rapporto tra noi e le compagnie. Ndc va oggi ottimizzata con gli elementi utili che racchiude, nella spe-



I numeri di Amadeus su Ndc

Funzionalità rilasciate nel 2024	46
Investimenti anno su anno	+20%
Funzionalità a settimana implementate	1,5
Persone che lavorano 7 giorni su 7 su Ndc	400
Vettori live	28
Agenzie attive	48.000
Agenzie italiane	+1.200

Fonte: Amadeus Italia



ranza migliorino anche quelli non positivi. La dispersione su più interlocutori non è positiva perché porta a un appesantimento del processo per offrire il servizio migliore, oggi molto complicato in termini di tempo e risorse".

Il tour operator richiama poi alla formazione: "In questo momento serve una reale consapevolezza del processo Ndc. È qualcosa sulla quale tutti dobbiamo lavorare e deve servire poi per l'utilizzatore finale. Dobbiamo disporre di una conoscenza approfondita per utilizzare tutta la validità dello strumento".

COSTI OPERATIVI

Per **Cisalpinia Tours**, come spiega il chief commercial & operations officer **Giorgio Garcea**, Ndc rimane "un'opzione, non un vincolo. Non siamo, non vogliamo e non possiamo diventare una software house. Non ce lo possiamo permettere perché abbiamo un tema di marginalità, siamo intermediari. La software house esiste già all'esterno, e per noi la strategia è quella di avere da loro tutta la tecnologia necessaria. La compriamo, non possiamo pensare, in un momento in cui si parla di intelligenza artificiale, di fare degli investimenti massimi in costi, risorse, specializzazioni. Per me è fondamentale avere un partner che lo fa di mestiere, che arriva prima e meglio".

Il manager poi fa un distinguo. "Siamo un gruppo articolato, nel network Ndc è molto presente ma per il business travel non ne sento l'esigenza, considerando il problema del costo ope-

rativo. Quindi, opzione, non vincolo, che per il momento decliniamo".

POSSIBILITÀ IN DIVENIRE

"In Ndc - dice **Frederic Naar**, ceo di **Naar Tour Operator** - vedo grandi potenzialità, in particolare sul continuous pricing e sulla segmentazione di prezzo. Mi immagino il futuro di chi fa pacchetti attorno ai servizi proprio come il miglior partner di coloro che devono vendere camere d'albergo, cabine di navi, seggiolini aerei. E, quindi, diventa un segmento estremamente interessante per poter ottimizzare i riempimenti senza andare a comprare al prezzo pubblico, e con belle possibilità di upselling. Nell'immaginario Ndc è ideale per la segmentazione e la massimizzazione. Dal punto di vista tecnologico, la sensazione è, però, che al momento si sia ancora in una fase di wishful thinking. Abbiamo iniziato a fare una prima integrazione, vedremo strada facendo".

COINVOLGIMENTO GLOBALE

Obiettivi Iata, multicanalità, offerte globalizzate, viaggi corporate e leisure, funzionalità, necessità di agenzia, network, ota e tmc, prenotazioni individuali e gruppi, ancillary e tariffe aviation destinate a crescere anno su anno e molti altri fattori compongono il quadro di una travel industry in continua evoluzione e differente per necessità in ogni settore.

Ndc è un processo in itinere che vede, da parti e con interessi diversi, tutti i player coinvolti. È così oggi, e ancora di più lo sarà nei prossimi anni.

Laura Dominici e Paola Olivari

Originaltour



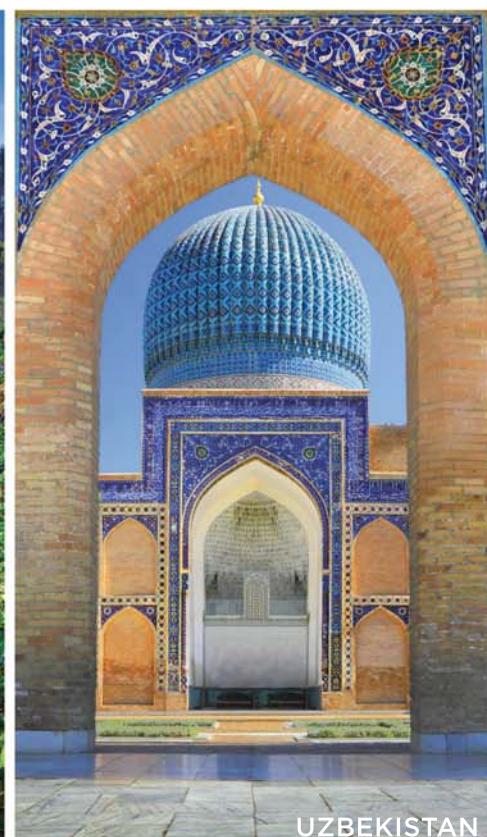
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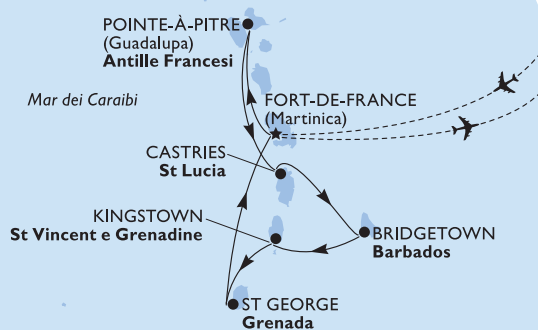
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