WINNING @ THE MOMENTS OF TRUTH

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WE ARE AT AN INFLECTION POINT

90 YEARS OLD

TECHNOLOGY IS DISRUPTING OUR INDUSTRY

WE ARE BEING INTERMEDIATED

OUR CUSTOMER IS CHANGING
THE MILLENNIAL WAVE

50% of US work force by 2018

1.8 BILLION worldwide
THE MILLENNIAL WAVE

More purchasing power in the next 10 years than any generation in history

2X more likely to travel vs. Boomers

Half of all travel purchases by 2020
NEXT GENERATION TRAVELERS

76% of room nights by 2018

3x the use of technology
powering the TRAVEL MOMENTS with DIGITAL
powering the TRAVEL MOMENTS with DIGITAL
HALO

MOMENTS
find the

MOMENTS

that matter most…
... and serve those moments FLAWLESSLY
DIGITAL PLATFORM
GROSS BOOKED REVENUE
in billions

$13.4B
+11% YoY

MOBILE APP
GROSS BOOKED REVENUE
in millions

$1.7B
+70% YoY

2012 $197M
2013 $358M
2014 $628M
2015 $1B
2016 $1.7B
WIN THE BOOKING

CONSIDER & EVALUATE
SHOP & BOOK
PRE-DEPARTURE
GO
ARRIVE
STAY | WORK | PLAY
RETURN

ACQUIRE
CONVERT

SERVE & DELIGHT
the value of WINNING the STAY

1st stay: +35%
2nd stay: +52%
3rd stay: 

life time value of customer
CONSIDER & EVALUATE

SHOP & BOOK

PRE-DEPARTURE

GO

ARRIVE

STAY | WORK | PLAY

RETURN

72% “Upgrade my room before I arrive”

73% “How do I get there?”

69% “Allow me to check-in in advance”

73% “Where should I go eat?”

71% “I need a ride”

64% “I need to text the hotel; alert me if my room is fixed”

70% “Alert me when my room is ready”

63% “Is there a hotel special today?”

57% “I want to pre-order room service”

66% “I want more TV options in my room”

71% “I need a ride”

73% “I need to check out on the go”

Sources:
*Marriott IPSOS study 2011 (N = ~1,500 travelers). Scores are top-2 box.
Marriott IPSOS study 2013 (N = ~3,000 travelers). Scores are top-2 box. First number is FBTs, second is Gen Y.
And it’s working…

20,000,000
MOBILE CHECK INs/OUTs
AND GROWING

4.5% → 16%
MOBILE CHECK-IN PACE
TRIPLED

3 of 5
GEN Y GUESTS HAVE
STRONGER IMPRESSION OF
MARRIOTT VS. COMPETITION
BASED ON APP EXPERIENCE

+2.5 pts
HIGHER SATISFACTION
MOBILE vs. NON-MOBILE
ARRIVAL EXPERIENCE
find the MOMENTS that matter most…
... and serve those moments FLAWLESSLY
easy, right?
6,000 hotels
1.2 million rooms
110 countries
1/3 managed
2/3 franchised
>500,000 employees
12 legacy systems
this journey is not about technology ... it is about transforming a service model
6 THINGS that can block digital transformation ... and how we overcame them
“Problem? What problem?”

1. Create clarity and urgency around the problem

War games make it real
... and break mindsets
2. Make the destination clear, relatable, achievable ... and inspiring

Vague, superficial, or overly technical “strategies”
3. Break the siloes... *hunt as a pack*

- Develop the **strategy & tactics** together
- Joint execution **teams**
- Retool key **jobs**
4. Align your Goals... ceiling to floor

- Shared purpose
- Joint accountability
- Clear priority across depts
- Affects compensation
5. Ride the existing rails where you can

• Use the familiar as the vehicle for the new
• Reduces how much unfamiliar change employees must absorb
6. Use pilots to de-risk 3 critical factors
focus on the real threat
outdated technology
RELEVANCE
“We tend to over-estimate what will happen in the next 2 years…

… and underestimate what will happen in the next 10.”
thank you