

INSIDE:

TOP 25

MOST INFLUENTIAL BUSINESS TRAVEL
EXECUTIVES OF 2014 Page 16



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STILL BLAZING TRAILS

The Business Travel Hall of Fame inducts, from left, airline alliance pioneer Jean-Cyril Spinetta, first woman inductee Marilyn Carlson Nelson, car rental leader Andy Taylor and first buyer inductee Andy Menkes. **Page 8**



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THE 25 MOST INFLUENTIAL EXECUTIVES IN THE BUSINESS TRAVEL INDUSTRY



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IHG To Buy And Boost Kimpton Hotels

BY MICHAEL B. BAKER

INTERCONTINENTAL HOTELS GROUP has reached an agreement to acquire Kimpton Hotels & Restaurants for \$430 million, and the multibrand hotel giant plans to ramp up Kimpton's growth in the United States and elsewhere.

The acquisition brings Kimpton's 62 U.S. hotels into the IHG family of more than 4,700 hotels, with almost 700,000

rooms around the world. In a conference call last month with investors to discuss the deal, IHG

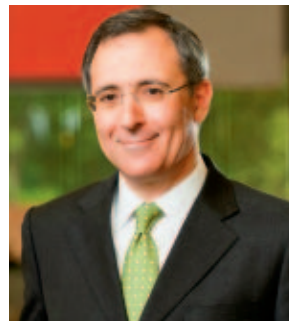
CEO Richard Solomons said the boutique, upper upscale Kimpton brand fills a "white space" in the company's brand portfolio. He called it a "strong strategic fit" with IHG's Hotel Indigo brand, a boutique brand at the upscale price point, and IHG's recently launched Even brand, which is centered on health and fitness. Together, those brands would allow IHG to "create the [industry's] leading lifestyle boutique business," Solomons said.

Kimpton COO Mike DeFrino will lead the Kimpton team following the acquisition, according to IHG. Additionally, IHG plans to use Kimpton's "market-leading research on restaurants and bars" in its other brands, Solomons said.

Kimpton, meanwhile, had "reached a stage where it needed a scale player to take it to the next phase of its growth," he said. Currently, Kimpton has 16 hotels in its pipeline, 10 of which are under construction. IHG plans to accelerate that growth and launch it outside of the United States, particularly in Europe and Asia.

Baird Equity Research in a note on the transaction wrote that "IHG has shown a willingness to grow its lifestyle brands using its well-capitalized balance sheet; additionally, the Kimpton Real Estate Investment Funds, which are run by four existing Kimpton executives and currently own about 30 percent of the brand's existing and pipeline properties, are committed to growing the brand through future investments."

Current Kimpton CEO Mike Depatie is stepping down from his position to



"Kimpton had reached a stage where it needed a scale player to take it to the next phase of its growth," which is to help "create the industry's leading lifestyle boutique business."

—IHG CEO RICHARD SOLOMONS

focus on managing the real-estate funds, according to *The Wall Street Journal*.

Besides those owned by the Kimpton Real Estate Investment Funds, Kimpton's other properties are owned by third parties including Pebblebrook Hotel Trust and LaSalle Hotel Properties. While those owners have change-of-control provisions in their management agreements, the Baird note

speculated that those owners already have approved the transaction.

This is InterContinental Hotel Group's first brand acquisition since the 2003 acquisition of midprice extended stay Candlewood Suites, Solomons said. IHG expects to close the deal in the first quarter of 2015, pending antitrust clearance and approval from Kimpton shareholders. ☛

Hyatt To Provide Free Wi-Fi For All

Hyatt Hotels Corp. in February will make Wi-Fi free in guest rooms and public spaces at all hotels worldwide "regardless of booking method or loyalty program participation." Some Hyatt properties offer for a fee faster "premium Wi-Fi" service, which Hyatt Gold Passport members at the diamond or platinum tier also may access for free. **Marriott International** and **Starwood Hotels & Resorts** recently said they would extend free Internet to travelers who book through their websites and mobile channels and to higher-tier loyalty program members.

Two Concur Co-Founders To Step Down After SAP Buy

Concur co-founders Rajeev Singh and Michael Hilton are leaving the company on Jan. 30, according to three separate emails sent to employees. Former executive vice president and general manager of small and midsize business Elena Donio takes over the role of president, formerly held by Rajeev Singh, while Barry Padgett, previously Concur EVP and general manager of Europe, Middle East and Africa, succeeds Hilton as EVP of travel services, according to an internal memo from CEO Steven Singh. Rajeev Singh and Hilton are available through June for "transition-related activities," the emails stated.

AA Applies To Take Delta's Tokyo Haneda Slot

American Airlines this month applied to the **U.S. Department of Transportation** to operate daily nonstop service between Los Angeles International Airport and Tokyo's Haneda Airport. American is seeking to replace **Delta's** route allotment to Haneda from Seattle, which DOT is reviewing after Delta reduced frequency from daily to seasonal. **Hawaiian Airlines**, which serves Haneda from Honolulu, is seeking to serve Haneda from Kona, Hawaii. The U.S.-Japan bilateral agreement allows four daily U.S. roundtrip flights to Haneda, which is closer to Tokyo's city center than Narita International Airport. The other two slots are served by Delta from LAX and **United Airlines** from San Francisco.

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“It’s wonderful that fuel has run down—we love it. There’s a \$2 billion opportunity out there if we hold fare levels constant. But over the very long-term horizon, it’s just more conservative

and prudent to use a high fuel assumption when you’re buying airplanes or making other investments, and then when it comes in lower, hang on to all of it.”

—Delta Air Lines CEO **Richard Anderson** discussing in December how the airline in 2015 is seeing a \$1.7 billion reduction in fuel costs as oil falls



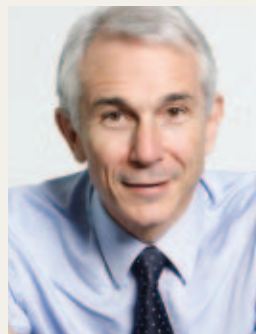
“You will clearly not see in the foreseeable future any major acquisitions from SAP.”

—SAP CFO and COO **Luka Mucic** during the Credit Suisse Annual Technology Conference in Scottsdale, Arizona, in December, speaking the same week its \$8.3 billion acquisition of Concur closed



“The industry story is largely positive, but there are a number of risks in today’s global environment—political unrest, conflicts and some weak regional economies—among them. A 3.2 percent net profit margin does not leave much room for a deterioration in the external environment before profits are hit.”

—IATA director general and CEO **Tony Tyler** on the outlook for 2015, during which the airline association expects airlines globally to earn \$25 billion, up from its projected \$19.9 billion in 2014



“This is an opportunity for us to target smaller corporate commercial customers who we think we can service well.

We’re using the launch, and the feedback that we’ve been getting from our smaller corporate customers, to fine-tune the way that we’re marketing to the segment, but we’re happy with the enrollments so far.”

—Advantage Rent A Car president **William Plamondon** on the company’s new Advantage for Business program, which offers a flat pricing structure and other perks for frequent business travelers, and seeks to attract companies that “may not get the attention and competitive rates” that the three major U.S. car rental companies offer to larger corporate accounts

Interview: WestJet’s Gregg Saretsky



WestJet during the past few years has undergone a number of changes, including introducing its Encore regional service, growing its presence in the corporate market and, most recently, adding a first-checked-bag fee for its lowest fares. WestJet president and CEO Gregg Saretsky recently updated BTN senior editor Michael B. Baker on the Canadian airline’s initiatives.

Business Travel News: Have you increased corporate market share?

Saretsky: It’s one segment of the market where we’ve seen tremendous traction. Part of that is the value proposition that WestJet provides and the attention we’re placing on corporate travel. We historically have been overindexed in leisure and underindexed in business, and if you look at our market share domestically, we have about a 37 percent share, but when you look at managed corporate business, we have about a 10 percent share. That would define the gap that we see between the opportunity and the level at which we’re currently playing, so it’s a big opportunity for us.

BTN: What are your strategies to increase that market share?

Saretsky: Corporations are increasingly mandating that their travelers are not entitled to book premium classes of service on journeys of less than five hours. That, for the most part, is the corporate travel policy across North America, which plays right into our sweet spot because we have very few flights that are over five hours. Since we don’t have a business-class cabin, that change to corporate policy has allowed us to become relevant to corporate travelers. We are a low-cost carrier whose fares for last-minute travel are significantly below other North American carriers, including our principal domestic competitor, Air Canada. If you have a corporate policy that says no business class, and you’re booking within the last seven days, you’re going to find fares on WestJet on the order of 20 to 40 percent lower than other competitors in similar markets.

BTN: How is your first-checked-bag fee being received?

Saretsky: It’s gone very well. We’re six years late to the party, and we avoided it as long as we could, but in the end, we decided that since 25 percent of our guests never check bags, they were effectively subsidizing the 75 percent who do. As we rolled out our fare bundles, we wanted to have a very skinny-down fare in our Econo bundle that was the cheapest possible travel from A to B. We’ve rolled all of the extra product benefits out of that fare bundle, so you pay for a bag only if you buy our lowest fare. If you buy the higher fares, bags are free: one bag for the Flex bundle and two bags for

the Plus bundle. We have something for everybody now, which we didn’t have before. If you just want a cheap fare and pack light and carry your bag on board, there’s no charge for the bag.


At the same time, we announced the tiering of our frequent-flyer program. The WestJet rewards program formerly was just a binary thing—you were either a member, or you weren’t. On Oct. 29, we rolled out three different tiers: gold, silver and teal. If you are playing in our program at the silver level, you get one free bag, and at the gold level, you get two free bags, so there are a variety of ways for our guests to avoid paying for baggage. The first-bag fee only affects one in five guests, and as a result, that’s gone over very well.

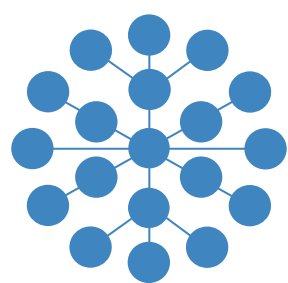
BTN: What international destinations will you be adding?

Saretsky: We announced Dublin and started that service last June, and we announced Glasgow, Scotland, and we’ll start that one in May 2015. The balance of the international network we won’t be announcing until the middle of 2015.

BTN: Have you considered joining one of the major alliances?

Saretsky: We have a partnership with Delta, and we announced [Dec. 11] fully reciprocal earn and burn with the SkyMiles program. We also have a partnership with American Airlines. They’re pretty consumed right now with the integration of US Airways, so our relationship is not as fully developed as it is with Delta, but we expect in 2015 we’ll get to complete reciprocity as well with American.

The choice for us, as we look at the world we bring together for our frequent flyers with both American and Delta, is a more robust solution than having just one player. We’ve chosen not to join SkyTeam or Oneworld for that reason, but we’ve chosen members carefully, so we have great geographic representation in our stable of codeshare and alliance partnerships without joining a global alliance. On the Pacific, we have Cathay Pacific and Japan Airlines, who are Oneworld members, but we also have Korean Air and China Southern and China Eastern, [which are SkyTeam members]. We have Qantas, which is Oneworld. We have Air France/KLM and British Airways. 



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BUSINESS TRAVEL HALL of FAME



Tony D'Astolfo, right, inducting Andy Menkes.



Jack O'Neill, left, inducting Marilyn Carlson Nelson.



Steve Maritz, right, inducting Andy Taylor.



Richard Anderson, left, inducting Jean-Cyril Spinetta.

Last month's Business Travel Hall of Fame induction ceremony at the St. Regis in Manhattan was another great evening celebrating the leadership and vision of those who shaped the industry. Though not without humorous moments, this year's inductions were a little more about toasting than roasting than in the past, and some of the speeches were downright inspirational. It also did not go unnoticed that this year featured the Hall of Fame's first inductions of a woman and of a corporate travel buyer.

The fourth induction class since The BTN Group inau-

gurated the Hall of Fame in 2011 included the late Max Hopper, Marilyn Carlson Nelson, Jean-Cyril Spinetta, Andy Taylor and Andy Menkes.

Delta Air Lines CEO Richard Anderson, there to induct former Air France CEO Spinetta, talked about their longtime partnership and Spinetta's trailblazing efforts to lead European Airlines beyond the days of national flag carriers by pioneering airline alliances. Maritz CEO Steve Maritz, a close friend of Enterprise executive chairman Taylor, was on hand to talk about Taylor's humility and hometown volunteerism. Retired Carlson Wagonlit North America

president Jack O'Neill came to talk about former Carlson chairman and CEO Carlson Nelson's business accomplishments in merging Carlson and Wagonlit and leading its global growth as well as her leadership in the stand against child prostitution and her efforts to mentor others. PhocusWright Managing Director Tony D'Astolfo recognized the creativity and audacity that Partnership Travel Consulting chairman Menkes has displayed throughout his career, including becoming the first travel manager to secure Airlines Reporting Corp. accreditation as a Corporate Travel Department.

Along with Hopper, whose pioneering use of information technology for airlines was recognized by previous inductee Jeffrey Katz, this year's class of class acts joined Katz and the other 18 existing members in the Business Travel Hall of Fame.

The BTN Group congratulates the Business Travel Hall of Fame class of 2014.

Quotes and information on the inductees appear on the following few pages and industry bios and videos of speeches by inductors and inductees can be found at www.businesstravelhalloffame.com under 2014 Inductees.

— DAVID MEYER

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MARILYN CARLSON NELSON

CLAIM TO FAME:

Helped lead the merger of Carlson and Wagonlit and an industry stand to fight against child prostitution.

“We loved the fact that we could serve people who wanted to know others better and wanted to do business around the world and somehow bring the world closer together.”



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ANDREW W. MENKES

CLAIM TO FAME:

Helped create and became the first corporate travel buyer to hold the Corporate Travel Department designation and pioneered an Internet-based corporate-direct electronic ticket purchase with British Airways and with JetBlue.

“I share this award with my family, as well as my extended family of travel managers, past and present, who have had the challenge of defending a managed travel program every day, ever since it started.”



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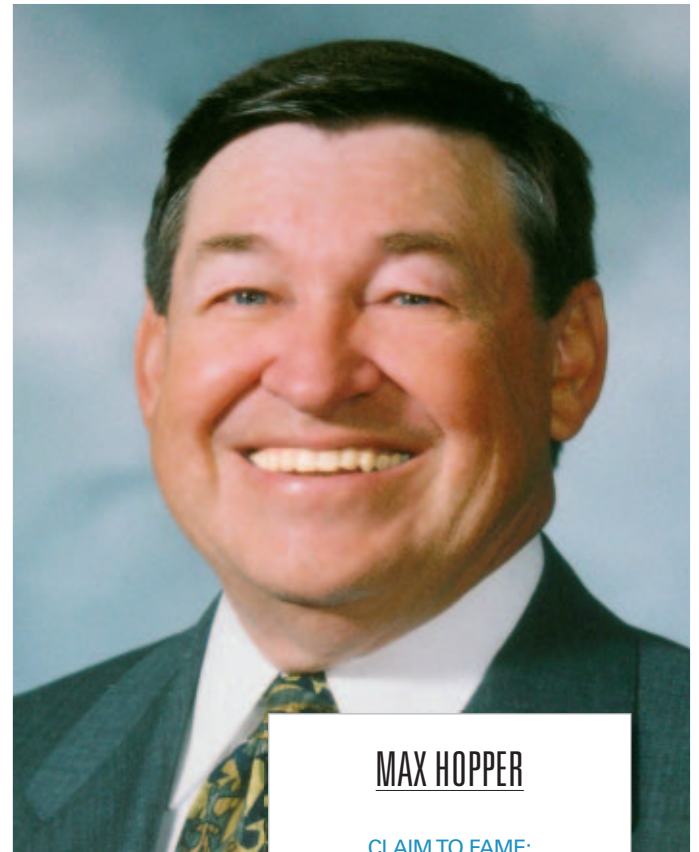


JEAN-CYRIL SPINETTA

CLAIM TO FAME:

In merging Air France and KLM and subsequently creating an alliance with Northwest Airlines, he created the model of the twenty-first century global airline.

“The period of the organization and the implementation of the first cross-border merger, which created a European champion and a worldwide leader, was probably the most exciting time of my working life.”



MAX HOPPER

CLAIM TO FAME:

His pioneering use of information technology to define marketing leverage for airlines helped create airline frequent-flyer programs and enhance global distribution systems

“Participating in the first four decades of travel reservations systems development has been exciting, but I believe that the best is yet to come.”

ANDY TAYLOR

CLAIM TO FAME:

Built his family business into the undisputed leader of the U.S. car rental industry and helped lead the fight against taxes that single out rental car customers to fund unrelated projects and programs in local communities.

“We had 8 percent market share in 2007, and we bought the Alamo/National operations when they became available in 2007, and that took us to 26 percent. We’re the largest now by a good margin.”



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BUSINESS TRAVEL

HALL *of* FAME



MAX HOPPER

Max Hopper not only improved the business travel industry's grasp of its data, he also became the archetypical CIO. Max served as the chief information officer of Bank America, the senior vice president of information systems of American Airlines and the chairman of the Sabre Group. Actually born in 1934 in a log house, Max Hopper was a true industry pioneer in using information technology to make airlines better operationally and more profitable and in helping to bring computers to the desktops of travel agencies. Max didn't start Sabre, which launched eight years before he landed there in 1972, but in the 20 years that he was at its helm he became "the first person who really defined the marketing leverage that could come from using technology," according to Harvard Business School professor James I. Cash Jr. In 1981, Max helped launch the industry's first frequent-flyer program: AAdvantage, which automatically tracked the mileage of its members. In the late 1980s, Max pioneered systems integration when he led the development of the InterAAct desktop network at American Airlines. Max died in January 2010.



ANDREW W. MENKES

Andrew W. Menkes helped develop and became the first travel manager to secure ARC accreditation as a Corporate Travel Department, allowing business travel buyers to serve as their own agency of record in gathering data and commissions from suppliers. Also as Republic New York Corp.'s first vice president of global travel management, he pioneered an Internet-based corporate-direct electronic ticket purchase with British Airways and with JetBlue. Andy served as an officer for the Association of Corporate Travel Executives, which he helped found, as well as a board member of the National Business Travel Association and its Institute for Business Travel Management. Andy began his more than 30-year travel industry career with TWA. Nine years later, he founded and served as CEO for the New York-based travel agency Priority Travel, and subsequently held a number of regional and executive positions for mega travel agencies. After Republic merged with HSBC in 2000, Andy founded Partnership Travel Consulting. Business Travel News named him Travel Manager of the Year in 1999 and one of the 25 Most Influential Travel Executives in 1998 and 2000.



MARILYN CARLSON NELSON

Marilyn Carlson Nelson, former Carlson chairman and chief executive officer, led Carlson to become the first North American travel company to take a stand against the sexual exploitation of children in the travel industry and sign the international Code of Conduct to end child prostitution, child pornography and the trafficking of children for sexual purposes. Marilyn also joined with the Queen of Sweden to co-found the World Childhood Foundation. President Obama in 2013 honored the company with the inaugural Presidential Award for Extraordinary Efforts to Combat Human Trafficking. In 2014, Marilyn was chosen by a committee of Nobel Prize recipients to receive the "Oslo Business for Peace Award." In 2006, H.E. Jean-David Levitte, French Ambassador to the United States, inducted Marilyn in the French Légion d'Honneur. Marilyn serves on the boards of the United Nations Global Compact, The Committee Encouraging Corporate Philanthropy, The National Endowment for Democracy and the Kennedy Center for the Performing Arts. Today, she teaches corporate responsibility to MBA students at the Carlson School of Management at the University of Minnesota.

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Congratulations!

The BTN Group is pleased to congratulate the Business Travel Hall of Fame Class of 2014, honored during a black-tie ceremony and reception at the St. Regis New York on December 8, 2014.



ANDY TAYLOR

Andy Taylor is executive chairman of Enterprise Holdings, the privately held business founded in St. Louis in 1957 by his father, Jack Taylor. The only investment-grade company in the U.S. car rental industry, Enterprise Holdings operates Alamo Rent A Car and National Car Rental as well as its flagship Enterprise Rent-A-Car brand, which combined with its Enterprise Fleet Management affiliate accounted for 1.4 million vehicles last year. Following his graduation from the University of Denver with a bachelor of science in Business Administration in 1970, he began working for RLM Leasing, a Ford Motor Company affiliate in San Francisco. After three years, Andy returned to Enterprise, which then operated a fleet of only 5,000 cars. In 1976, he became the general manager of Enterprise Rent-A-Car's St. Louis regional operations, and was promoted in 1980 to president and chief operating officer. Andy became chief executive officer in 1991 and chairman in 2001. In June 2013, he transitioned to the position of executive chairman. In 2009, Andy was inducted into the U.S. Travel Hall of Leaders. Andy also serves as Trustee of Washington University in St. Louis, Trustee for the Naval Aviation History Foundation, Life Trustee of the Missouri Botanical Garden and director of Commerce Bancshares.



JEAN-CYRIL SPINETTA

Jean-Cyril Spinetta, who became chairman and CEO of Air France in 1997, led Air France to merge with KLM in 2004, becoming chairman and CEO of Air France-KLM. He stepped down from CEO in 2009, but remained chairman of both companies' boards. In October 2011, he became chairman and CEO of the Air France-KLM Group until stepping down in 2013. He also chaired the supervisory board of Areva from April 2009 to June 2013. Today, Jean-Cyril is honorary chairman of the Air France-KLM board of directors. He also sits on the boards of Alitalia and Alcatel-Lucent and is chairman of the CNEE (National Education Council). He began demonstrating his leadership skills in 1972 as head of the investments, planning and research department of the French Ministry of Education and was subsequently seconded as auditor to the Council of State in 1976. In 1978, he was appointed to the general secretariat of the government and in 1984, was appointed chief of staff to Michel Delebarre, who was successively Minister of Labour, Employment and Vocational Training, Minister of Social Affairs and Employment and Minister of Infrastructure, Housing, Transportation and Maritime Affairs. In 1996, Jean-Cyril joined the staff of the European Commissioner in charge of Science, Research and Education.

The Business Travel Hall of Fame Scholarship Fund

Established in 2011, the Business Travel Hall of Fame Scholarship Fund supports the next generation of business travel leaders.

United Airlines and The BTN Group presented scholarships to two students pursuing degrees at the New York University Preston Robert Tisch Center for Hospitality and Tourism.

Christina Jenkins
B.S. Hotel and Tourism Management

Julie Burna
M.S. Tourism Management

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2014

THE 25 MOST INFLUENTIAL EXECUTIVES IN THE BUSINESS TRAVEL INDUSTRY

For the 31st time, *Business Travel News* looks at the executives who most influenced the business travel industry in the previous year to understand the directions in which they have pushed the industry envelope.

Buyers on this year's list came up with new approaches to get credit for their ancillary expenditures and for their negotiated rates to be visible to their travelers as well as for launching an effort to expand opportunity for women in the industry. Providers of new technology named here include those seeking to enhance and to disrupt traditional travel practices. Travel management company executives on the list

enabled their organizations to add scale through consolidating resources. Government officials appearing on this list expedited travelers passing through airport security and customs lines and joined with other industry leaders in advancing next-generation distribution standards.

The biggest deal of the year, the acquisition of Concur by SAP for \$8.3 billion, landed two executives on the list. This was the first appearance on the *BTN* Top 25 list for SAP CEO Bill McDermott, but for Concur CEO Steve Singh this year's appearance ties him with former American Airlines chief Robert Crandall for the all-time record of 10 appearances. Singh is joined

by repeat honorees Ed Adams, who is making his fourth appearance on this list, and Richard Anderson, Michelle "Mick" Lee, John Pistole and Arne Sorenson, who all are making their second appearances.

Following several solicitations for nominations, *BTN* editors during the fall of 2014 created this year's list and first revealed it Dec. 8 at its Business Travel Trends & Forecasts 2014 conference in New York City.

While *BTN* editors rate these 25 as the most influential business travel executives of 2014, they do not attempt to rank the honorees' relative influence.

The *BTN* Group thanks all those who participated in creating this year's list. [↗](#)

BTN TOP 25, 2014

ED ADAMS, *Direct Travel*
RICHARD ANDERSON, *Delta Air Lines*
BRIAN CHESKY, *Airbnb*
ROB FALIVENE, *Cisco*
ANTHONY FOXX, *U.S. Department of Transportation*
DARRIN GRAFTON, *Serko*
STEPHAN HYLANDER, *The Volvo Group*
TRAVIS KALANICK, *Uber*

R. GIL KERLIKOWSKE, *U.S. Customs and Border Protection*
MICHELLE LEE, *Women in Travel*
VIC MACCHIO, *Dinova*
DAVID MARCOU, *Marcou Transportation*
BILL MCDERMOTT, *SAP*
ERIK MUELLER, *Grasp Technologies*
CHRISTOPHER NASSETA, *Hilton Worldwide*
GREG O'HARA, *Certares*
JAMIE PHEROUS, *Corporate Travel Management*

JOHN PISTOLE, *U.S. Transportation Security Administration*
TOBIAS RAGGE, *Hotel Reservation Service*
VITRGINIA ROMMETY, *IBM*
STEVE SINGH, *Concur*
ARNE SORENSON, *Marriott International*
RITA VISSER, *Oracle*
MARK VONDRASEK, *Starwood Hotels & Resorts Worldwide*
ANDREW WEINSTEIN, *Open Allies for Airfare Transparency*

ED ADAMS

CEO

Direct Travel

In 2011, Direct Travel CEO Ed Adams, backed by private equity dollars, embarked on a plan to roll up midmarket agencies into a \$1.5 billion travel management company. The long-time agency vet last year closed in on that target by acquiring six U.S.-based corporate agencies: Best Travel & Tours, Caldwell Travel, Child Albany Travel of New York and Vermont, Hurley Travel, Peak Travel Group and Travel Destinations Management. Those followed three other acquisitions made since initiating the rollup plan, comprising Corporate Travel Services in Minneapolis,



Travel Management Corp. and what had been DirectTravel.

While Direct Travel now handles “just under” \$1 billion in net air sales and \$1.5 billion in total sales, according to a spokesperson, Adams isn’t finished. Last month during The BTN Group’s Business Travel Trends & Forecasts conference in New York, Adams said he expected “continued consolidation of TMCs,” with Direct Travel planning “to add another four to six TMCs” in 2015.

If that sounds familiar, it is. Adams built up Navigant International in a similar fashion before selling in 2006 to Carlson Wagonlit Travel.

Asked last year by *The Beat* about the lessons learned from his tenure at Navigant, Adams said, “The importance of keeping the key employees and stakeholders within the midmarket customer engaged and trying to coordinate and consolidate methodologies, from front office, mid-office and back office.”

Concerning goals, Adams told *The Beat*, “I’d love to get to \$18 million to \$20 million EBITDA. At that number, it opens all kinds of new possibilities in terms of a bigger private equity firm opportunity maybe to move outside North America and other possibilities on the table.”

— JAY BOEHMER



RICHARD ANDERSON

CEO

Delta Air Lines

As indicated by corporate travel buyers surveyed both formally and informally throughout 2014, Delta Air Lines last year further solidified its strength as the market favorite. The carrier topped *BTN*’s annual Airline Survey for the fourth year in a row and handily outscored its competitors in all survey categories. Buyers at *BTN* events throughout the year also had high praise for their relationships with Delta.

While this reflects several years of airline industry leadership, CEO Richard Anderson and his team also led some industry changes during the year.

The first was the shifting of Delta SkyMiles to a revenue-based program rather than a mileage-based program, meaning points accrual depends on the amount spent for the ticket rather than the distance flown. United Airlines soon followed with a similar move for its program. While American Airlines remains a mileage-

based program, the carrier for now is much more concerned with integrating its program with US Airways’.

Delta in 2014 also introduced a new suite of services for corporate buyers called Delta Edge, including a web portal through which buyers can access reporting and manage various aspects of their relationship with the carrier. While Delta is still refining its offering, Delta Edge already is garnering raves from buyers—“no other airline comes close,” one buyer noted in responding to *BTN*’s 2014 survey.

Delta stands poised to continue its influence into this year. It remains to be seen, for example, whether its competitors will mimic its introduction of Basic Economy fares—stripped down, highly restrictive economy fares that include virtually no amenities and intended to compete with such ultra-low-cost carriers as Spirit Airlines—as part of its five-tier airfare structure unveiled late last year.

— MICHAEL B. BAKER

BRIAN CHESKY

Co-founder and CEO

Airbnb

Co-founder and CEO Brian Chesky led lodging industry disrupter Airbnb in 2014 not only to complete a \$500 million round of fundraising that helped raise its valuation at \$13 billion, but also to launch a set of tools to help business travelers plan trips and manage expenses.

On July 28, Airbnb announced that it had “worked closely with Salesforce and Facebook to reinvent business travel, and now more than 30 companies have already signed up to work with Airbnb, including Evernote, Eventbrite and Lyft.” It also introduced a dedicated website, Business Travel on Airbnb, as a tool to help business travelers search for and book accommodations, manage budgets and submit expenses.

As it also announced then, Airbnb partnered with Concur to later in the year begin enabling business travelers who use Concur’s TripLink service to book Airbnb listings directly and automatically prepopulate those expenses in Concur.

With more than 1,000,000 listings in 190 countries and a valuation now higher than all but the four largest global hotel companies—despite the fact that Airbnb doesn’t own or operate any hotels—it is little wonder that the company has met with resistance in some locations and countries.

The company has faced legal challenges in Barcelona, Malibu, Paris and New York City over concerns that its operators are circumventing zoning, codes, regulations and taxes, but Airbnb this year appears to have overcome such contentions in San Francisco, where the city approved a law to go into effect next month making it legal for residents to rent out rooms only in their primary residences through Internet sites. Airbnb, based in San Francisco from its founding in 2008, welcomed the new law even though it will mean that a sizable minority of its rentals would become illegal.

A report issued in November by New York attorney general Eric Schneiderman charges that nearly three-quarters of all Airbnb rentals in New York City are illegal and shows commercial operators, rather than residents, supply more than one third of the units. During



Airbnb’s negotiations in April that provided four years of data to the attorney general after a court fight, the company said it would stop doing business with hosts that had 2,000 or more listings in New York because they “weren’t providing a quality, local experience to guests.”

— DAVID MEYER



ROB FALIVENE
Chief Procurement Officer
Cisco

To fundamentally change the hotel procurement process is a feat as unlikely as it is challenging. To do so in a seller's market in which hotels are banking strong revenue quarter after quarter—when they presumably would be more resistant to structural change—is truly noteworthy. So it is with San Jose, Calif.-based tech giant Cisco Systems, which under chief procurement officer Rob Falivene has developed multiple multiyear deals with multibrand hotel companies that contain neither market-

share targets nor room-night commitments, promising instead only revenue in exchange for lower room rates.

The strategy, borne of a feeling Falivene shared with Cisco director of global travel Susan Lichtenstein that Cisco's negotiated hotel rates insufficiently reflected the amount of the company's business, has quantitatively worked: Cisco's hotel cost savings during the first 15 months of the new contracts' existence were about 25 percent higher than during the prior 15-month period.

Still, Cisco's innovation couldn't have come to fruition had hoteliers refused to take part in it. Cisco conducted extensive research and analysis that showed extensive benefits of increased use for

hotels in the program, even though Cisco's costs would be lower.

"Once we were able to show them that they could balance revenue from our usage, as we would give them our spend, they then balanced the demand and were able to see where, as long as they get our spend and they assured themselves they're going to get the revenue, then they could lower our rates based on our larger spend," Falivene said.

The level of Cisco's influence with its hotel suppliers goes beyond simple relationship management. "It's a science," Falivene said, "and we're applying a science when I think other people are kind of playing just a price-negotiation game."

— CHRIS DAVIS

ANTHONY FOXX
Secretary
U.S. Department of Transportation

Anthony Foxx, sworn in as secretary of the U.S. Department of Transportation in the summer of 2013, has since taken two significant steps in the realm of travel distribution and got both going on the same day.

On May 21, 2014, DOT tentatively approved the International Air Transport Association's resolution that outlined its controversial New Distribution Capability data transmission standard. DOT's decision incorporated elements brokered by Open Allies for Airfare Transparency and IATA to make NDC more palatable to agency, distribution and consumer advocate critics.

Making its decision final in August, DOT paved the way for the industry to move the standard forward and, according to IATA, help airlines modernize distribution methods via third parties, such as corporate travel agencies. "This was a long-awaited decision that finally cleared the path to the full and wide deployment of the program across the industry," said director of IATA's New Distribution Capability Program Yanik Hoyles. Following approval, IATA declared the standards effective, embarked on further pilots, released its first end-to-end schema and produced strategy papers and implementation guides to spur adoption. Among significant users of the standard, United Airlines already is transmitting premium economy seat-



ing content to the Amadeus global distribution system.

DOT on May 21, 2014, also initiated a long-delayed rulemaking initiative that, while not yet final, could greatly impact corporate travel distribution. Among proposals still being weighed by DOT following a public comment period that ended in the fall, are potential regulations that could govern the display of ancillary fees in various sales channels, redefine the government's definition of "ticket agent" to include meta-search engines that facilitate air sales and place new customer service requirements on "large" travel agencies, defined as those with at least \$100 million in annual revenue. DOT has not yet set a timeline for its final rulemaking.

— JAY BOEHMER

DARRIN GRAFTON
Co-founder and CEO
Serko

New Zealand-based technology company Serko in the past year acquired the assets of online expense management company Incharge, launched an initial public offering that generated NZ\$17 million, secured a U.S. patent for its Travel Expense automation, secured Apple's use of its NFC technology to support Apple Pay, integrated with AirPlus and won a NZ\$4 million grant from the New Zealand government to develop patents including mining and resource and mobility.

Co-founder and CEO Darrin Grafton counted among the company's biggest 2014 accomplishments the acknowledgement of five patents filed in the past year and the building of a new service framework that allows what he calls Travel Management 3.0 to occur. "It is the evolution of being able to input all of the direct content via a single application and being able to change everything and be able to link everything via a different framework. Rather than having an open booking, you now can have a framework that everyone connects into via the supply chain and there's no cost to doing it so there's no barrier to entry. Suddenly the direct content comes inside the travel program so that policies apply."

The cloud-based software-as-a-service technology focuses on the traveler experience, with the travelers driving the roadmap to determine what they want from a feature set.

With the Incharge expense management acquisition, Serko gained pre-



ferred status from Diners Club and Discover throughout Asia because it can support the complexity and multi-language needs of China and India.

The expense patent filed in June was really focused around travel. It is designed for pre-allocated spending. If the traveler is in a location or conducting a transaction that is not inside policy or budget, it switches to the traveler's personal card.

The near field communication technology was a patent that Serko was not using until Apple made it mainstream by adopting it for the iPhone 6 to use with Apple Pay.

In addition to Airplus, Serko is integrated with ENett, and is willing to work with any payment system.

The company's June IPO raised NZ\$17 million, of which about NZ\$2 million is being used to raise its headcount to 134 people.

Serko, which works with partners nuTravel and KDS to distribute its products, currently is adapting the technology that it designed specifically for the mining and resources sector to expedite the booking of tickets for groups of 10 or more.

— DAVID MEYER

STEPHAN HYLANDER

*Strategic Purchasing
Manager for Marketing
and Travel*

The Volvo Group

Many corporate travel professionals believe that the established travel management model—travelers booking at negotiated prices through global distribution system-powered travel management companies—is broken. Many travelers don't want to play that game anymore when they can buy better and cheaper without corporate interference.

So what's the solution? One much-touted suggestion has been so-called open booking, although that route perhaps never totally



has escaped its withering dismissal by one of last year's *BTN* Top 25 execs, KDS CEO Dean Forbes, as "failure dressed up as innovation."

Another option is to make established travel management practices better. Stephan Hylander of Volvo Group took the latter approach and rebooted his company's preferred airline program, for which *BTN* named him 2014 Multinational Travel Manager of the Year and now to this year's Top 25 list.

If corporate negotiated fares are going to stay relevant, they need to be literally the best deal in town, and that's why Hylander persuaded his key preferred suppliers to agree to discounts on all fares, "even if it was only 1 percent lower" in the case of the most heavily discounted classes. "Our travelers should always notice they are getting a slightly cheaper fare ... through us," Hylander said.

According to Hylander, "the first time we spoke to the airlines, they

looked at us with horror." But, with the exception of Lufthansa, which didn't fall in line until it lost market share, they came around to the idea. The result: a return to the traditional airline deal proving a win for all parties. For Volvo, average paid fares fell 10 percent in 2013 and another

2 percent in 2014. Travelers gained by knowing the easiest option also was the best-priced. And the preferred airlines won too, as typical market share climbed from 65 to 70 percent to more than 90 percent on key routes.

Perhaps one reason Hylander was able

to make all parties happy is that he knows more than the buyer's side of travel. Before joining Volvo in 2001 he worked both for an airline (SAS) and a travel management company (Bennett BTI, later to become part of Hogg Robinson Group).

— AMON COHEN



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TRAVIS KALANICK
CEO and Co-Founder
Uber

Despite many corporate travel buyers' qualms about the sharing economy, app-based transportation network Uber in 2014 blossomed into a force that even some skeptical buyers had to grin and bear—and many others decided to embrace.

In 2014, Uber grew its operations from about 60 cities in 21 countries to more than 250 cities in 50 countries, co-founder and CEO Travis Kalanick said in a December blog post. The company capped off the year by announcing it had raised \$1.2 billion in financing in part to fund for further expansion, especially in the Asia/Pacific region.

Uber also began more actively to court the corporate travel market. It launched Uber for Business for creating corporate accounts, and partnered with Concur and American Express to link Uber booking, payment and expenses.

Some buyers continue to be wary of Uber, citing safety concerns regarding drivers without insurance and background checks despite Uber's reported requirements in those areas. Others have adopted it into their travel programs. Both Morgan Stanley and Citi announced late last year that they added Uber as a recommended transportation option in their travel policies.

"Employees expressed their strong affinity for the convenience Uber offers them in their personal lives and wanted that flexibility for their business travel needs," Morgan Stanley chief human resources officer Jeff Brodsky said.

Although some traditional ground transportation suppliers are critical of Uber, they still admire the model. Dav El Chauffeured Transportation Network president and CEO Scott Solombrino, for example, told *BTN* last summer that his group plans to eventually launch an Uber-like mobile app for on-demand chauffeured services.

— MICHAEL B. BAKER

R. GIL KERLIKOWSKE
Commissioner
U.S. Customs and Border
Protection

In late 2013, frustration with long wait times for international arrivals at U.S. airports reached a boiling point, with entities from Delta Air Lines to the U.S. Travel Association issuing calls to action.

By the end of that year, Automated Passport Control kiosks emerged at a handful of U.S. airports as a promising new technology to ease the strain. The kiosks enabled travelers to scan passports, complete customs declarations and submit other travel details before reaching a U.S. Customs and Border Protection officer, thereby "reducing the time a traveler spends with a CBP officer," according to CBP.

Thanks to CBP's regulatory oversight,

the kiosks reached critical mass in 2014 and now are present in more than 30 U.S. airports and a few preclearance facilities abroad.

The expansion of APC is one example of CBP's efforts in the past year to ease arrivals and save travelers time. Another is the release of a passport control mobile app, through which eligible passengers can use smartphones to submit passport information and make customs declarations, then receive a digital bar-coded receipt to be scanned by customs officers. That program began piloting in Atlanta in August, with plans for further expansion, according to CBP.

In announcing that program in August, CBP commissioner R. Gil Kerlikowske in a statement noted, "CBP continues to transform the international arrivals experience for travelers by offering new and innovative ways to expedite entry into the United States, while maintaining the highest standards of security. By offering this app to passengers, we



hope to build upon the success we have already experienced with Automated Passport Control, which has resulted in decreases in wait times as much as 25-40 percent, even with continued growth in international arrivals."

— JAY BOEHMER



MICHELLE LEE
Founder
Winit: Women in Travel

Developing a women's leadership program in the travel industry is something Winit: Women in Travel founder Michelle "Mick" Lee said she's thought about for years, and in the last year and a half she put those thoughts into action. Her dissatisfaction with the dearth of women speakers representing the business travel industry at trade conferences was the "genesis" of Lee's drive to change the status quo.

"When more than half of the workforce is female, it's not only frustrating

to not see us [women] represented on stage, but the views, opinions and topics are not representative of the overall views of the industry," Lee said. "Also, the more senior you are, the fewer women there tend to be."

Women represent 48.8 percent of the U.S. labor force, yet they hold only 14.6 percent of executive officer positions in *Fortune* 500 companies and 5 percent of *Fortune* 1000 CEO roles, according to the latest 2015 and 2013 figures by Catalyst, a nonprofit organization that promotes inclusive workplaces for women. While this situation is not unique to the travel industry, what was distinct in travel was the shortage of programs and global efforts to help women advance, Lee said.

"Some [programs] were geared toward women once you reached a certain level or were geographically limited," she explained. "When I couldn't find what I was looking for, I decided to create it."

Unlike such industries as finance, in which the initial challenge is to recruit women and then promote them, the travel industry already had a large female base, Lee explained. What the travel industry needed was a way for them to advance.

Having both women and men participate also was important to Lee because "it would be a waste of time if women sat together and talked about the problem in isolation. We're not going to accomplish anything unless we talk to each other," she said.

Two important catalysts further

stimulated Lee to create the organization. The first was the business travel industry's reaction to her idea. During the 2013 Global Business Travel Association Conference in California she began her journey simply by asking both women and men in the industry if the idea of a coed organization dedicated to supporting women in travel was something they could support.

"Every single person I spoke to, man or woman of any level, jumped on board immediately," she claimed.

The second breakthrough was getting support from the Clinton Global Initiative after Lee pitched the idea to former U.S. Secretary of State Hillary Clinton during the same GBTA conference. CGI's guidance and endorsement helped give Lee and the organization the credibility it needed to fuel momentum.

Soon after that, more people officially joined Lee to help lead the organization, including Reed Exhibitions Americas regional president Hervé Sedky, Starwood Hotels SVP of sales organization Christie Hicks, United Airlines SVP of worldwide sales Dave Hilfman and GBTA president Donna Kelliher.

Winit officially launched its inaugural event before the 2014 GBTA conference, about a year after Lee began her quest. All first-year startup costs were sponsored so membership remains free and in November Winit launched a global mentoring program across job roles that begins this month. Winit now boasts nearly 1,500 LinkedIn members.

— JOANN DELUNA



VIC MACCHIO
Founder and CEO
Dinova

Generally smaller than a typical organization's airline and hotel expenditures, dining nevertheless can comprise a decent share of a business traveler's dollar, and management of those expenses often has taken the form of daily caps.

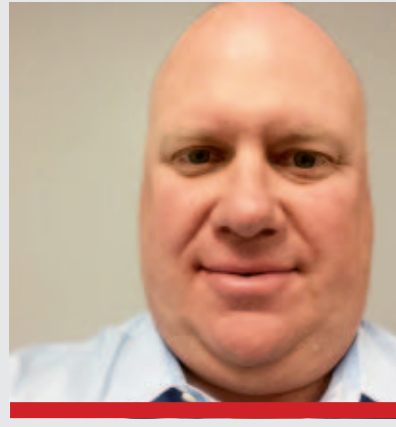
Vic Macchio, founder and CEO of corporate dining network Dinova, de-

veloped a different way to approach the issue and has been rewarded with a growing presence in some of the world's largest travel programs. Dinova, which charges more than 12,000 U.S. restaurants for membership in its network and pays rebates to corporate clients based on spending volume at those restaurants, claims as clients more than one-third of *BTN's* Corporate Travel 100, Macchio told *BTN*. He said spending in the network in the third quarter of 2014 was up 7 percent year over year.

Dinova's near-term future could include partnerships with agencies and an enhanced version of its app, originally released last year. Not restricted to Dinova clients, the app is available on Android and iOS platforms.

"The bigger we build our network, the better it is for everybody in the network," Macchio said. "The more clients we have, the more business can go to our restaurants. The more restaurants we have, the easier it is for the clients to stay within the preferred network."

— CHRIS DAVIS



DAVID MARCOU
Founder and CEO
Marcou Transportation
Group

The chauffeured transportation industry that is now emerging (along with its bread-and-butter financial company clients) from the significant downturn of the 2008 global recession has changed. Many smaller companies didn't survive the downturn, a new threat has emerged in the form of Uber

and other on-demand car services and, arguably most notably, the Big Four chauffeured companies became the Big Three.

The latter change is thanks to Marcou Transportation Group founder and CEO David Marcou, whose company last year acquired Dav El Chauffeured Transportation Network, less than a year after it purchased BostonCoach from longtime parent Fidelity Investments.

The deal, described by privately held Marcou as the largest in chauffeured transportation industry history and a prelude to further consolidation, joins together more than 3,000 employees, 1,700 owned vehicles and more than \$250 million in annual volume.

The BostonCoach and Dav El brands are expected to remain, and the newly formed company promises to be a strong competitor with such chauffeured firms as Carey International and EmpireCLS.

Marcou officials also have vowed to create a chauffeured-centric Uber competitor. In an industry filled with threats new and old, Marcou's bet is that size will matter.

— CHRIS DAVIS

Serko CEO named
one of *BTN's*
Most Influential
Business Travel
Executives of
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ERIK MUELLER
CEO
Grasp Technologies

Grasp's pioneering technology, emphasis on collaboration and inability to say "no" has produced one of the most innovative companies in the travel industry today. Grasp's CEO Erik Mueller said the company takes jobs that "no one else will or others say are impossible—we're horrible at saying 'no.'"

A quick glance at Grasp's long list of products and services quickly reveals that the company does more than travel data management and custom reporting, yet data collection and integration remain at the core of its business.

"The goal is to be the Switzerland of data, to allow anyone to trade data with anyone and do it in their chosen format," Mueller said. "Secure Connect technology allows us to suck in and spit data out in any format."

The dual-synching technology automates data collection and expulsion from "any" source and format, Mueller claimed. Secure Connect automatically harvests data from such disparate sources as travel management companies, global distribution systems, expense management systems, corporate cards, human resources, telephone and social media data, as well as such native formats as hotel folios, spreadsheets and PDFs.

"It gives everyone a bigger, better picture and allows different companies to provide more and better information to

their customers, helping them reconcile all that information across multiple platforms," he explained.

With Secure Connect, data within Grasp's system also is automatically updated within one day whenever a user changes it, Mueller claimed. "With other systems, users have to export data for a [specific] time period," Mueller said. "It's not smart that way."

Additionally, Grasp integrates with such credit card companies as Master-



BILL MCDERMOTT
CEO
SAP

"We wanted this one. It completes us, as Jerry Maguire would say," SAP CEO Bill McDermott said in September 2014 following the Concur acquisition announcement.

SAP agreed to pay \$8.3 billion, or \$129 per share, to acquire Concur. While some analysts said this price was steep, as it represented about a 20 percent premium based on Concur's Sept. 17, 2014, closing price, McDermott felt the value SAP would gain was well worth the price. In fact, it was a value SAP previously had recognized back in 2012, when it tried and failed to acquire Concur, according to U.S. Security and Exchange Commission filings.

McDermott praised Concur as the "best, most marquee asset in the industry," and its products as being "better than anyone [else's] in travel" and which "blow away the competition."

McDermott recognized the value in Concur's extensive and established business network and sizable customers SAP would be gaining—23,000—which the companies estimated would contribute up to \$45 million in cloud subscriptions and support revenue for 2014.

In other words, SAP could have a 360-degree, integrated cloud offering that would satisfy most—if not all—of companies' business needs, not only in travel, but also a platform with all the automation, data, reports, reconciliation, mobile capabilities, alerts, bells and whistles that a company could wish for—if the companies get it right.

There will be many challenges ahead, especially the looming departure of Concur co-founders Rajeev Singh and Mike Hilton at the end of January.

Regardless of SAP's challenges, its vision and attempt to create such a platform and experience for customers is highly ambitious.

— JOANN DELUNA

service TripBam and agency network Hickory Global Partners, Grasp has created a neutral and highly integrated and automated ecosystem for exchanging data.

While the travel industry sometimes can be stingy with data sharing, Mueller said he believes that more integration, sharing and collaboration will only benefit the industry in the long run.

"People with that [closed-minded] attitude will get left behind," he said. "Don't get me wrong, there's a lot of value in data but if they're going to drive business to people there has to be some openness and transparency between everyone and the ability to share freely with each other is really key."

"If someone wants to charge for data, there's no problem," Mueller said, "but they should make it easy for people to consume that data."

Grasp's highly integrated platform also is building for the future, which Mueller said would include machine-learning technology in 2015. Last year Grasp also launched an internal technical training program—which in the next three years he hopes to launch as its own Grasp University entity—to teach new hires about the history and opportunities in the travel industry.

"There's a lot of very technical people with a lot of great skills and the travel industry hasn't really attracted those kinds of people," Mueller explained. "Travel has so much to offer. It's the most exciting industry you can possibly work in and it's never boring, so I think that would attract a lot of technical people."

— JOANN DELUNA



CHRISTOPHER NASSETTA
President and CEO
Hilton Worldwide

It's been about five years since Hilton Worldwide president and CEO Christopher Nassetta changed his company's name from Hilton Hotels Corp., and under his leadership that change has been far more than cosmetic.

Prior to Nassetta taking the top leadership position in 2007, Hilton was a very different company, divided largely into geographic silos and lacking the spectrum of hotel brands visible at many of its multibrand competitors. Many of its brands had little presence outside of the United States.

Fast-forward to 2014, by which time Nassetta had added a slate of new executives, integrated opera-

tions and moved Hilton's headquarters from Beverly Hills, Calif., to McLean, Va. It also marked Hilton's first full year as a newly public company, following a \$33 billion initial public offering in late 2013.

"We have worked hard to become fully aligned as one company, and as a result, we are now number one in room supply, pipeline and rooms under construction," Nassetta said in a statement provided to *BTN*. "We've seen an increasing desire among our corporate customers to consolidate and globalize their hotel programs, and we're now in a better position than ever before to fulfill these needs."

Nassetta also continued to fill in the gaps in Hilton's brand offerings in 2014 by introducing two brands: Curio, a boutique collection of upper-tier hotels, and Canopy, a "lifestyle" brand.

— MICHAEL B. BAKER



GREG O'HARA
*Founder and
Managing Partner
Certares*

Greg O'Hara's influence could be measured in many ways, but let's start with \$900 million. That's the amount an investment group led by Certares, O'Hara and others spent for a 50 percent stake in American Express Global Business Travel, with the other half of the joint venture remaining at Amex.

American Express in July 2014 completed the creation of the business travel joint venture, which was announced in September 2013. Amex CFO Jeff Campbell said then that "it has at times been difficult for travel to compete for investment dollars."

No more. "With the creation of the joint venture and the infusion of \$900 million of capital from our investors, we now have even greater resources that the marketplace requires to not only stay ahead of the curve, but to create the curve," Amex GBT president and CEO Bill Glenn said last year.

The story of Amex's reinvention still is being written, but O'Hara is certainly a key author with a powerful pedigree.

He was chief investment officer of JPMorgan Chase's Special Investments Group and managing director of JPMorgan's private equity arm One Equity Partners. He's been in management roles at Worldspan and Sabre and held board seats for Carlson Wagonlit Travel, Travelport, Worldspan and others.

— JAY BOEHMER



JAMIE PHEROUS
*Managing Director
Corporate Travel
Management*

Founded 20 years ago as a small travel management company with a single office in Brisbane, Australia, Corporate Travel Management enters 2015 as a growing multinational TMC with sights set on challenging the megas for national, regional and global accounts.

CTM's acquisition strategy has bol-

stered its position in the TMC pecking order. Last year, CTM purchased Alaska's USTravel, Houston-based Avia International Travel and D.C.-area TMC Diplomat Travel. Now, the company said it spans "all major time zones" in the United States, with operations in 18 cities in eight states. Managing director Jamie Pherous said by the end of next fiscal year, CTM will have nearly \$1 billion in U.S. sales volume.

CTM for the first time last year entered the European market in a meaningful way with a December deal to purchase U.K.-based Chambers Travel.

CTM operates in four continents, 23 countries and 46 cities with a staff of more than 1,800—for now.

Pherous said his goal is not to build the largest TMC, but one that blends global scale and local empowerment with nimble decision-making.

"Usually what happens at these big mega companies is they're slow at making decisions," he said. "Provided we keep client-focused, we can be a big business that thinks small."

— JAY BOEHMER

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JOHN PISTOLE
Administrator
U.S. Transportation Security Administration

First launched at a handful of airports three years ago, the expedited screening program PreCheck rapidly expanded to more than 120 airports under the leadership of Transportation Security Administration administrator John Pistole.

When Pistole, a former Federal Bureau of Investigation deputy director who led the TSA since mid-2010, stepped down from his position at the

end of last year, he left behind a thriving and rapidly growing program that eliminates some security hassles—removing shoes or taking laptops out of bags, for example—for pre-screened frequent travelers via dedicated security lanes. Eleven carriers, including the eight largest U.S. carriers and Air Canada, participate in the program.

Besides the expansion of available security screening lanes, the TSA in 2014 also concentrated on expanding enrollment in the program via application centers. Through more than 300 application centers nationwide, the agency enrolled more than 740,000 travelers since December 2013, Pistole said in a

December 2014 blog post.

The TSA now is looking outside its own house at ways to continue enrollment expansion.

“We have only so much bandwidth, so we see it as a great opportunity for us to engage third parties in the business of doing enrollment programs,” Pistole said at the Global Business Travel Association’s conference in Los Angeles last summer. “We could then work in a partnership with them to facilitate that on the wholesale level.”

This marks the second time that *BTN* has recognized administrator Pistole’s contributions to business travel.

— MICHAEL B. BAKER

TOBIAS RAGGE
CEO
Hotel Reservation Service

Hotel Reservation Service’s public relations team sent journalists a note last year asking for the company to be referred to henceforth as a hotel solutions provider. Judging by the near-meaninglessness of the phrase, HRS itself struggles to characterize the full extent of what it does for a living, and that hints at the magnitude of its influence on the European accommodations market.

HRS simultaneously competes and cooperates with almost every type of intermediary that sits between hotels and their guests, including global distribution systems, travel management companies, online travel agencies, corporate booking tools and hotel representation companies. Robert Ragge founded the company in Cologne in 1972. His son, Tobias, who took over as CEO in 2008, told *BTN* in 2013 that HRS is, among other things, “the biggest independent hotel chain in the world.” HRS provides distribution for 250,000 properties worldwide, of which just over 60 percent belongs neither to any chains or franchises, so certainly one key influence it can be credited with is bringing independent properties into the realm of the managed travel program.

All can be booked via HRS’s corporate booking tool or public website, and all are available without GDS intervention. Conversely, all the GDSs have come calling to HRS. Amadeus has distributed HRS content since 2012, while in 2014 Sabre completed implementation of HRS content, TravelSky started implementation and Travelport signed a deal.

Ragge told *BTN* he considers collecting the full set of GDSs one of his

company’s major achievements in 2014, along with the introduction of virtual payments for booking its inventory and developing yet another line of business—hotel program sourcing and analytics for corporate clients.

HRS remains privately owned and refuses to divulge financial or transactional figures, nor marketshare estimates. However, start talking hotels with any European corporate travel professional and its name soon comes up. Two vignettes make the point. The first: During a recent *BTN* roundtable interview with four European buyers on the topic of accommodations, the quartet devoted considerable time to discussing how they work with HRS. The second: A senior executive at a major TMC recently confided to *BTN* that his company had significantly restructured its hotel strategy to compete with the threat of HRS.



Ragge said his priorities for 2015 are working on the TravelSky and Travelport implementations, expanding HRS’s sourcing service to meetings and groups and developing the company’s business intelligence and benchmarking capabilities. Expect more activity in the United States too, especially now that the Sabre tie-up is completed. HRS will open a New York office in March to be run by a newly appointed chief for the Americas.

— AMON COHEN

VIRGINIA “GINNI” ROMMETTY
CEO
IBM

Rumors of IBM’s exit from the expense reporting sector already had been circulating in the industry, but when the company opted not to have a booth to showcase its Global Expense Reporting Solution at the Global Business Travel Association’s 2013 conference as it customarily had in previous years, suspicions grew.

Existing IBM GERS customers, then speaking on the condition of anonymity, told *BTN* they were in the dark—and therefore frustrated—about the future of the expense product. They reported often having requested necessary updates and enhancements to their systems, but were given the runaround by IBM as to how and when the updates would happen.

In the following months, the IBM GERS team members were reshuffled and the staff slowly dwindled. Competing expense management firms, including Certify and KDS, also reported to *BTN* recent inquiries about their systems from existing GERS customers.

The number of companies in 2013 that reported using Concur Expense, 22, trumped GERS’s reported five users, according to *BTN*’s 2013 Corporate Travel 100, which profiles the top 100 U.S. business travel spenders.

On May 5, 2014, *BTN* learned of IBM’s plans not only to sunset its GERS tool by March 31, 2016, while honoring existing contracts past that date, but also to partner with and begin referring clients to its biggest expense management competitor Concur.

One GERS client, Harman Interna-



tional, reported to *BTN* it had received notification from IBM as early as April 28, 2014, of the plan to shutter. Other clients, including pharmaceutical company Eli Lilly and healthcare firm Anthem, previously known as WellPoint, also confirmed to *BTN* having received similar notifications, while other companies reported not having been notified. On May 6, 2014, Concur officially announced the partnership.

The surprising move, which must have at least had Ginni Rommetty’s endorsement, altered the expense management landscape by clearing a path for the existing leader in the space, Concur, as well as opening up client opportunities for smaller and international expense management companies.

IBM’s decision also was a strategic move in maintaining relationships with its GERS clients who also use IBM’s ERP solutions, as both IBM and Concur have similar-sized clients. Concur vice president of corporate strategy and investor relations Todd Friedman said: “If you are IBM, you’d much rather see customers go to Concur than” direct competitors.

— JOANN DELUNA

ARNE SORENSON

President and CEO
Marriott International

As many hotel companies turn their development attention toward Africa, Marriott International in 2014 leapfrogged the competition by completing a more-than-\$200-million acquisition of one of the continent's largest hotel companies.

Prior to its acquisition of South Africa-based Protea Hospitality holdings, completed in April 2014, Marriott had only a handful of hotels in northern African countries and none in sub-Saharan Africa. That single acquisition brought 116 properties in South Africa and six other African countries into



the Marriott portfolio, nearly doubling Marriott's distribution in the Middle East/Africa region and making it the largest hotel company in the region.

Speaking shortly after the acquisition was announced, Marriott president and CEO Arne Sorenson said Africa was one of the "world's great development areas" where "we're seeing good governments in a number of places, we're seeing economies grow, and we're seeing the size of the middle class grow." Rich in resources, it's also an area of growing interest for business travelers. Development in Africa from the ground up, however, can be slow, particularly in areas with emerging infrastructure. With only a few large-scale hotel companies focused exclusively within Africa, Marriott's acquisition of Protea was one of the few opportunities available for such quick growth in the region.

Marriott plans to open 30 additional properties across Africa by 2020, including nine scheduled to open this year. That will bring Marriott's African portfolio to a total of 150 properties with 19,000 rooms across 17 markets.

— MICHAEL B. BAKER



STEVE SINGH

CEO
Concur

When one visits Concur's website, there now is an orange banner that runs across the width of the web page. Within the top left hand corner of the banner rests a small blue and white SAP logo along with the words "Concur is now part of SAP. Learn more." It's subtle, but noticeable, especially for those who often visit Concur's site.

That banner was inserted after SAP completed its \$8.3 billion acquisition of Concur on Dec. 4 last year.

Long before the acquisition announcement on Sept. 18, 2014, CEO Steve Singh and Concur executives maintained Concur's focus on its customers. And the acquisition provided a "great opportunity to advance that mission," Singh said in a statement and has expressed similar sentiments in press interviews and conference calls following the acquisition announcement and closing.

While the effects of the acquisition on existing clients remain to be seen—although some Concur clients speculated Concur's customer service levels would decline as the companies transition—the deal undoubtedly was a financial success for Concur and its shareholders, particularly for American Express, which held a major portion of Concur shares.

SAP in 2012 previously had shown interest in acquiring the company, but not much resulted from the talks, except for the occasional rumor that Concur would be purchased by SAP or a company of equal financial health in the years that ensued.

According to U.S. Securities and Exchange Commission filings, negotiations began in May last year with requests for updates on Concur's business from SAP.

By July, SAP had proposed an initial offer of \$110 per share. Concur's board

ultimately declined the offer, stating it "represented insufficient value," according to SEC filings. SAP increased its offer to \$120 per share, but Concur held firm to its value and requested \$135 a share.

The final purchase price of \$8.3 billion was based on a value of \$129 per share. While the amount was \$6 per share less than what Concur requested, the offer represented a 20 percent premium on Concur's Sept. 17 closing price, as well as \$19 per share more than SAP's initial offer.

The final purchase price was not solely achieved because of Concur's savvy negotiation skills, but was due to its 22 years of hard work to build a business proposition that quarter after quarter surpassed revenue expectations. It was a business that successfully grew to 23,000 customers and needed to employ nearly 5,000 employees to sustain growth.

It was based on the co-founders' dedication to an innovative—and often controversial—vision of "the perfect trip" and a more interconnected world, which required strategic partnerships and acquisitions. Concur became a business competitors feared and felt the need keep up with — even to attempt to acquire.

With this deal, Steve Singh ties Bob Crandall's record of being named by *BTN* editors as one of the 25 most influential executives in the business travel industry 10 times, a measure of industry influence that no one else has achieved or surpassed.

— JOANN DELUNA

RITA VISSER

Global Travel Process
Officer
Oracle

Business Travel News last summer recognized Oracle global travel process officer Rita Visser for getting major airlines to agree to use a formula she devised which gives her company credit for some ancillary airline expenditures against overall marketshare shortfalls.

The simple formula divides the money Oracle spends on ancillary baggage and seat charges by its average ticket price and adds that to its other ticket expenditures, providing the company with some compensation for its expenditures when it falls below its marketshare commitments.

Visser is a member of the Glob-

al Business Travel Association board, The BTN Group Advisory Board and the United customer advisory board, and represents the fourth largest U.S. business travel budget identified by *Business Travel News* in the Sept. 29, 2014 Corporate Travel 100 issue. Acknowledging that she had clout to get such airline agreements in place, she said Oracle's ancillary airline spending "isn't small. We just want to make sure we get credit for it."

Visser not only convinced Oracle preferred partners United and Delta Air Lines to agree to this solution, but other airlines also have agreed to make use of this formula. She also has spoken with many corporate travel buyers endeavoring to follow her example, and some who have succeeded in doing so.

— DAVID MEYER





MARK R. VONDRASEK
*Senior Vice President of Distribution,
Loyalty and Partnership Marketing
Starwood Hotels & Resorts
Worldwide*

Mark R. Vondrasek, senior vice president of distribution, loyalty and partnership marketing for Starwood Hotels & Resorts Worldwide, led the charge in 2014 to enable guests to use smartphones as hotel keys.

Vondrasek said the decision to provide this capability to members of the Starwood Preferred Guest loyalty program came from guests pointing out the pain point of long check-in lines and asking to use their smartphones to check into their rooms.

Early in 2014, Starwood went to the largest lock manufacturer in the world, Assa Abloy in Switzerland, and asked the locksmith to partner and create something together. “We had to figure out a lot operationally,” Vondrasek said. “From how to get the lock to work perfectly every time at the hotel level, and the device and guest usage level took us a big part of last year to get right and to pilot.”

The technology, activated by Android version 8 and iOS 5 and 6 devices, has been deployed to 10 properties so far, and by the end of the first quarter Starwood plans to replace the more than 30,000 room locks in all W, Aloft and Element properties, totaling 150 hotels worldwide.

“We will have such solutions across all of our brands by the end of 2015,” according to Vondrasek. “We are

working very hard on what it looks like for Sheraton and Westin and the other brands. It was important to us that Starwood would be the first to provide that capability. In many ways, Smart Checkin and Keyless for us was a response to a need our guests have around control and giving them back a bit of time. We worked hard to be first on this one.”

Hilton, working with a different lockmaker, is close behind, with a 10-hotel beta test of its mobile solution set for the first quarter of this year. Hilton also will soon enable its HHonors mobile room key app at all U.S. Conrad Hotels and Resorts properties. Next year, Hilton plans to deploy the technology across 11 brands globally, including DoubleTree, Hampton Inn, Embassy Suites and Waldorf Astoria.

Not only have other hotel chains looked to follow suit, but there is a Silicon Valley startup for that. In November of 2014, Proxco announced that it would provide a solution to assist hotels “to compete against Starwood’s new SPG Keyless technology.”

So far, Starwood reports that survey scores regarding the use of the hotel room key mobile app from Starwood Preferred Guests users have exceeded expectations. The 10-hotel beta test has focused on how hotels implement the system, the level of usage and making sure that the solution worked globally. “We found that more of our guests used this than we anticipated and there has been no operational challenge to the hotels at all,” Vondrasek said.

What Starwood is not doing is requiring anyone to check in this way. “We recognize that keyless is not for everybody. It will never be a mandate,” he said.

— DAVID MEYER

ANDREW WEINSTEIN
*Executive Director
Open Allies for Airfare
Transparency*

The International Air Transport Association’s New Distribution Capability was among the most contentious distribution issues in recent memory. To IATA and airlines, it was a technology standard that promised to modernize third-party airline distribution. To critics—and there were plenty of them—it was a backdoor plot by the airlines to muddy fare transparency, bias pricing and impose new business models on distributors.

These varied views on NDC were aired in more than 250 public comment filings following IATA’s March 2013 submission to the U.S. Department of Transportation for approval of NDC’s foundational resolution.

Some agencies, distributors and advocacy groups latched onto language in Resolution 787 as proof that IATA

planned to require unprecedented levels of information from passengers shopping for fares and deploy discriminatory pricing strategies. They took issue with the language of the resolution, but also IATA’s perceived lack of inclusiveness in shaping NDC.

For a while, it appeared that the bickering wouldn’t end and DOT didn’t seem in any hurry to approve or deny IATA’s application.

Finally, the impasse broke and the air began to clear when Open Allies for Airfare Transparency in January 2014 announced a brokered agreement with IATA, in which the airline association would incorporate some agreed-upon conditions in a re-filed Resolution 787.

The IATA-Open Allies agreement began when several trade organizations during IATA’s 2013 World Passenger Symposium in Dublin publicly encouraged IATA to engage with various stakeholders and adhere to some principles they advocated. Shortly after, Open Allies for Airfare Transparency executive director Andrew Weinstein took lunch with IATA’s Doug Lavin, Weinstein recalled. “The real question I think we



were both asking was, ‘Is there a genuine willingness to talk on this issue and is there a possibility to come to a resolution to satisfy all parties?’”

The answer turned out to be yes, and those talks turned into meetings that incorporated Open Allies members, including representatives from the American Society of Travel Agents, global distribution system operators and the Travel Technology Association. “What became apparent was we weren’t as far

apart as we thought we were,” said Weinstein. “Even the initial conversation was one where we put forward some language around 787 that we thought would address our concerns in some areas, including the privacy issue and some of the original language that appeared to be outlining a new business model, and IATA was receptive to discussing that language and finding an appropriate compromise on it.”

The agreement announced in January 2014 made clear that Resolution 787 would be voluntary, would not require personal data disclosures, would not exclude other industry technology standards and not impact data ownership. The agreement quickly disarmed many critics, getting buy-in from global distribution system operators, agency groups and other advocacy organizations that once fought against NDC.

Indeed, DOT’s tentative approval of Resolution 787, which came in May 2014 and was made final in August 2014, incorporated the conditions from the January agreement between IATA and Open Allies.

— JAY BOEHMER

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