



# Mobile Migration Survey

**Travelers and buyers view mobile tech differently.**  
What will you do about it?

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- +** Getting over your security fears
- Mobile program strategies
- Choosing tech partners
- How smartwatches fit in

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October 26, 2015 Issue 791 Vol. 32, No. 16

Business Travel News (USPS 0728-870, ISSN 8750-3670) is published monthly except semi-monthly in March, April, June, July, September and October by Northstar Travel Media, LLC, 100 Lighting Way, Secaucus, NJ 07094, tel. (201) 902-2000, and is distributed free of charge to qualified corporate travel buyers and travel agents specializing in business travel in the United States and Canada. The cost of a print subscription to non-qualified subscribers is \$129 in the U.S.; \$142 in Canada and Mexico; and \$210 in other foreign locations; the cost of a digital edition subscription is \$65; payable in advance in U.S. dollars. Registered for GST as Northstar Travel Media USA GST No. 264513185. Canadian GST #123397457. Periodicals postage paid at Newark, NJ, and additional mailing offices. Business Travel News is a trademark owned exclusively by Northstar Travel Media. Copyright © 2015 by Northstar Travel Media, LLC. Reproduction of this magazine, in whole or in part, is prohibited unless authorized by the publisher. Editorial and advertising offices: 100 Lighting Way, Secaucus, NJ 07094. For all circulation inquiries, including new subscriptions, renewals, cancellations, changes of address and problems with missed deliveries, contact customer service by mail at Business Travel News, P.O. Box 47655, Plymouth, MN 55447; by phone at (800) 869-6882; fax (866) 658-6156; e-mail: [btn@kmpsgroup.com](mailto:btn@kmpsgroup.com); or website: <http://eforms.kmpsgroup.com/jointforms/Forms/Subscription.aspx?pubcode=BTN> POSTMASTER: Send change of address to Business Travel News, P.O. Box 47655, Plymouth, MN 55447. Printed in the USA.





# Informed Strategy Means Understanding Travelers

BY AMANDA METCALF

Keying into travelers wants is the key to engaging them with mobile travel management. That's the takeaway from *Business Travel News'* Mobile Migration Survey. Failure to embrace this basic tenet and making assumptions about traveler needs leads to lack of adoption no matter what mobile environment is offered.

While we're not there yet, the good news is that the industry is moving forward. Buyers are listening more carefully to their travelers, TMCs are listening more carefully to their clients and technology providers overall are getting the message that serving the traveler will serve the corporation in the end. But there are strategic decisions still to be made.


According to Michael B. Baker's story about developing mobile strategies for travel programs, "Find The Right Fit" on page 20, it's not just about having the latest gadgets but rather having access to and feeling empowered in the wide world to which smartphones, tablets and smartwatches connect users. "Mobile is just simply the way that people access online," Mobile Travel Technologies CEO Gerry Samuels said.

Acknowledging that doesn't make forming a mobile strategy and implementing policy any easier. "Technology ... is just changing so fast, and trying to keep up with it—it's just not on the top of my triage list," Financial Industry Regulatory Authority corporate travel services manager Carol McDowell said in Julie Sickel's story about travel managers' data security concerns, "The Monster Under Your Bed," on page 16. The story goes

on, however, to present other buyers' rationales for working with, not against, mobile apps and recommends ways for travel managers to navigate uncertain security terrain.

Fears set aside, travel managers should prioritize their mobile goals and then set a level of travel program governance to suit, Baker writes. A travel program that aims, above all, to boost traveler happiness might adopt the laissez-faire approach embraced by The Advisory Board Co.'s Steven Mandelbaum, whose travel policy is to let travelers do what they want. A program pushing policy compliance, meanwhile, might recommend apps that steer travelers toward a preferred booking tool and might ban others. As ACT corporate travel senior manager Jennifer Steinke said in her mobile strategy tips on page 24, "My program ... should look different because my company is different."

For those ready to get strategic, the priority becomes choosing the right technology partner. In "Who Ya Gonna Call?" on page 24, JoAnn DeLuna outlines three travel programs and why each went in a different direction.

Like the broader mobile category, "wearables are here to stay, said Sabre Hospitality Solutions general manager Cassandra Rollins in Jay Boehmer's story, "Are Wearables For Real?" on page 28. With their slower adoption rate, the industry won't be blindsided as it was by smartphones, according to Travel Tech Consulting president Norm Rose. "What I would be concerned with," he added, is [if] they don't have a mobile strategy at all. 

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We are especially pleased to sponsor this special *Business Travel News* Mobile Migration research report that provides insights to mobile travel service expectations of both business travelers and managers.

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Enjoy this issue,

*Kevin*

Kevin Krone  
Chief Marketing Officer  
Southwest Airlines

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<sup>3</sup> Based on the U.S. Department of Transportation's most recent data, Southwest Airlines is the nation's largest carrier in terms of originating domestic passengers boarded.



To Our Travel Industry Business Colleagues:

Travel and Transport is proud to be a sponsor of this special *Business Travel News* research report on Mobile Migration. The study serves as an important catalyst for organizations that are examining their current mobile travel management strategies, policies and best practices. Travel and

Transport views mobile and technology advancements as something that all organizations should keep a keen eye on as they prepare for the future of travel.

Travel and Transport has made a significant investment in, and has a laser focus on enhancing our mobile solution known as Dash Mobile. All mobile tools that we develop focus on the traveler and how to make their lives easier when they are on the road. While enabling our travelers with powerful travel tools and information is a focus of mobile, so too is our priority on intertwining technology that enables the traveler to contact our company with ease, anytime the need should arise. The demands of travel are taxing, so figuring out ways to help the traveler solve and move around the world in an efficient, safe and proactive way is a top priority for our company.

In addition to our mobile strategy, we are developing an industry-leading Big Data solution that will provide organizations with a 360-degree view of their spend data and a more definitive look into their expenditures. Big Data proves that the whole can truly equal more than the sum of its parts. Our Big Data solution will increase visibility into travel spend, reduce the need for expensive technology development, and increase the speed to market for future innovation and enhancements.

This is an exciting time for our industry. At Travel and Transport, we look forward to the future and know that technology will continue to be a driving force in the solutions we deploy to help our customers. Mobile solutions that we provide and will continue to advance will be one of the primary ways we can lead and influence the future of travel.

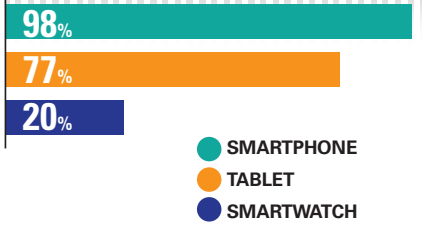
On behalf of the employee-owners of Travel and Transport, we thank you for your confidence in us as we help lead the way in travel management. We look forward to the New Year and the exciting times that lie ahead for our industry.

*Kevin O'Malley*

Kevin O'Malley  
President and CEO  
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### Which Mobile Devices Business Travelers Use

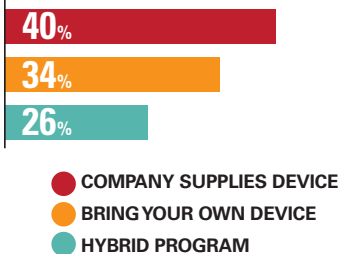


Source: *BTN* Mobile Migration Survey of 202 travel buyers, June 23-Oct. 14, 2015

### BYOD Environments Expanding

More companies are moving to bring-your-own-device environments that can complicate the mobile management picture. Larger companies and those in highly regulated industries like healthcare, insurance and financial and banking held tighter to company-issued-device

policies. The move is largely driven by cost savings as companies rely more on their employees to bear the expense of consumer technology that can serve dual-use for work. Among respondents who cited “hybrid” programs, many also cited an overall transition to BYOD.



Source: *BTN* Mobile Migration Survey of 202 traveler buyers, June 23 to October 14, 2015

# Mobile Disconnections

**As smartphones and travel apps reach nearly 100 percent penetration among active business travelers, travel managers must listen more to their travelers to shape a successful mobile travel management strategy.**

BY ELIZABETH WEST

The mobile migration is complete.

Only two of the 300 travelers queried in *Business Travel News*’ latest survey—of business travelers who took four or more business trips in the past 12 months—has resisted the magnetic pull of the smartphone. One of those individuals actually eschewed the phone for a next-generation tablet or smartwatch, leaving just a single business traveler among 300 surveyed without the power of a smart device in his or her hands.

These travelers aren’t stopping with one device, either. With 98 percent totting smartphones, 77 percent packing tablets and 20 percent wearing smartwatches, they are duplicating and even triplicating their access to information on the go, including, of course, travel content and travel apps.

As of September 2015, there were approximately 65,000 travel apps in the Apple App Store. As of June 2015, Google Maps had grabbed the No. 5 spot of most-frequently accessed apps among iOS and Android platforms with nearly 76.5 million unique monthly users. Apple Maps grabbed the No. 11 spot with nearly 35 million unique monthly users, while The Weather Channel hit the top 20 list twice with its

app at No. 16 and its widget at No. 20. Are these travel apps? Not exactly, and they are definitely not managed travel apps, but they do give business travelers critical information in the palm of their hands wherever they are in the world and whenever they need it.

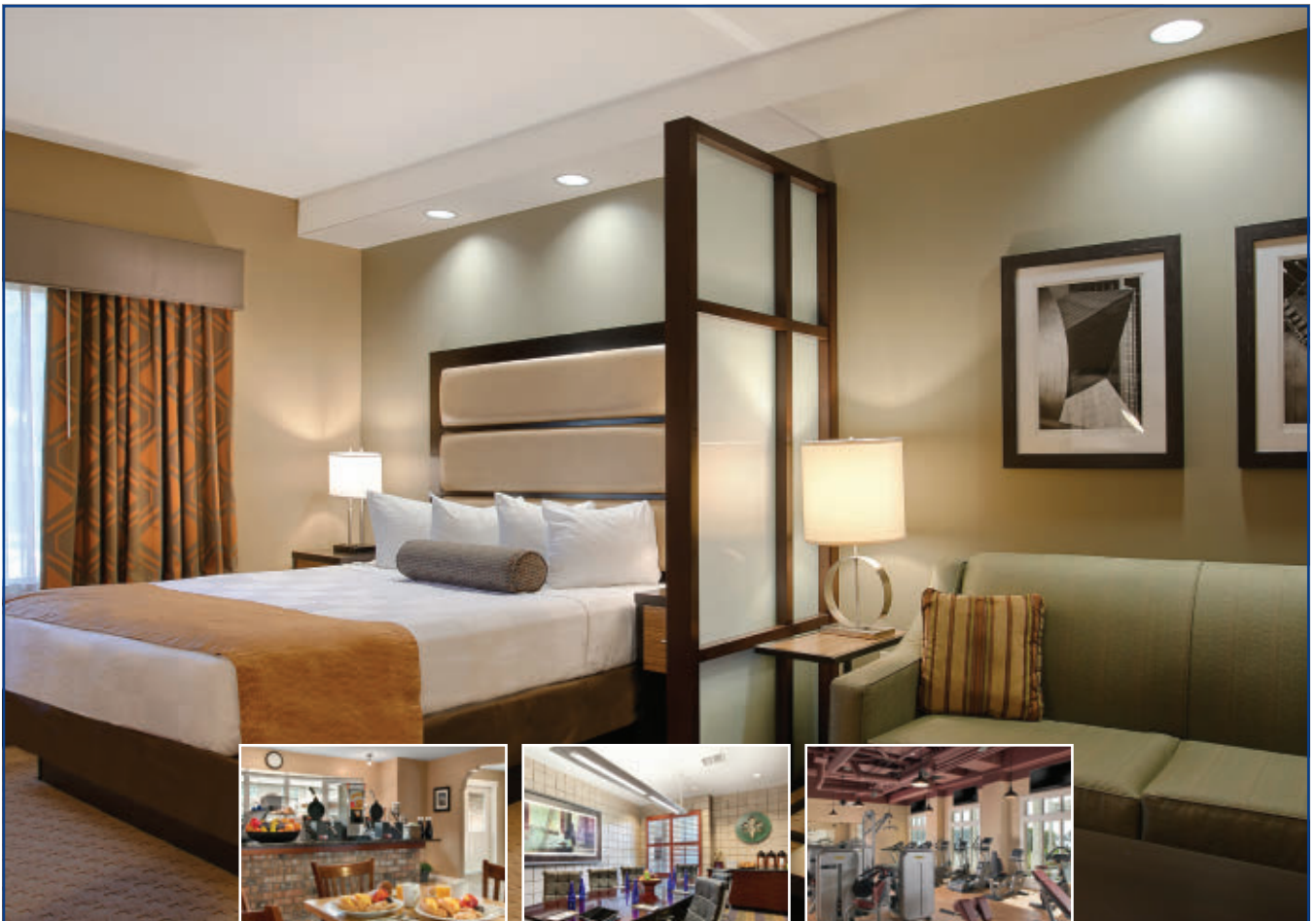
That’s the mindset shift that travel managers will need to get their heads around if they want to be successful in supporting their travelers on the road, said Marina Hegeman, managing director of TouristMobile, which provides real-time mobile travel messaging and support to employees of large, Europe-based companies. She has worked with big travel spenders like KPMG for several years.

“It’s not really about apps and smartphones,” she said, noting that companies often toss a few apps at their travelers to address specific pain points or even just to bridge a relevance gap. “It’s really about understanding the traveler and the travel journey at any point in time and in the context of the decisions they need to make.”

The problem is that we aren’t there yet—not by a long shot—according to the *BTN* research. We may all have migrated to mobile devices, but the shift

### Methodology

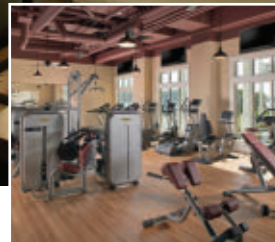
*BTN*’s 2015 Mobile Migration report includes a survey of 202 travel buyers from The *BTN* Group Advisory Board and Research Council and the readership of *Business Travel News* and *Travel Procurement*. *BTN* gathered those responses via Survey Monkey between June 23 and Oct. 14, 2015. The report also includes a survey Equation Research conducted in September of 300 people who had traveled by air for business at least four times in the previous 12 months.



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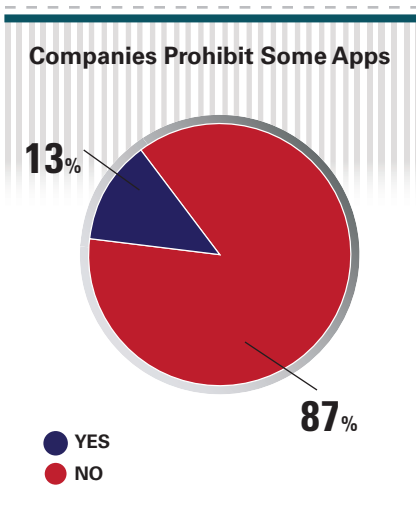
to a mobile mindset has barely begun. The good news, however, is that about half of travel managers are starting to acknowledge the lag and to see the benefit of pursuing a more aggressive—and a more informed—mobile travel strategy.

### MOBILE TRAVEL POLICY: WHERE ARE WE NOW?

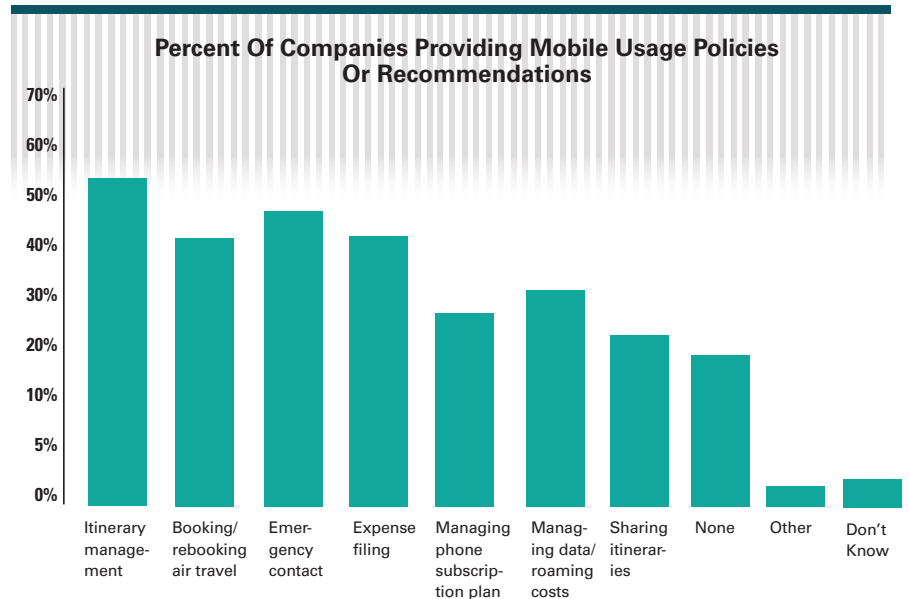
Few companies claim to have a comprehensive mobile travel policy. *BTN's* Mobile Migration survey indicates that most companies that have

policies around mobile communications in emergency situations and 42 percent around mobile expense filing, while 41 percent attempt to reign in mobile booking or rebooking for air travel. Less than one-third of the 202 travel buyers surveyed have addressed roaming and data costs, while less than a quarter try to manage social itinerary sharing.

The tactical approach reveals a reticence among travel managers to engage fully in the migration to mobile. One reason for this hesitation may be the



Source: *BTN* Mobile Migration Survey of 202 traveler buyers, June 23 to October 14, 2015



Source: *BTN* Mobile Migration Survey of 202 traveler buyers, June 23 to October 14, 2015

implemented policy have taken a scattershot approach, creating guidelines on a case-by-case basis, either as the company discovers new mobile app categories to implement (in the case of meetings and event apps, for example) or as problems arise (consider the spike in roaming and data costs for international travelers). Even this tactical approach has permeated only about three-quarters of the companies surveyed.

The most common mobile travel policies are associated with itinerary management apps—53 percent of companies said they had policies around them. Policy implementation falls off precipitously from there. Only 46 percent had

conflation of mobile technologies and “open booking,” or Managed Travel 2.0, as some have coined it. The concepts emerged simultaneously, as mobile technologies signaled a shift to a highly empowered corporate traveler with access to more outside-the-box information than ever. The fear of fragmenting access to travel content further and unintentionally supporting an open booking end game may have prevented the managed travel industry from taking more advantage early on.

These days, security concerns represent a major hesitation for corporations. This point emerged in the survey and at *BTN's* Innovate conference in September.

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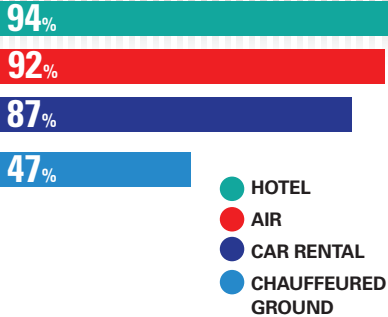


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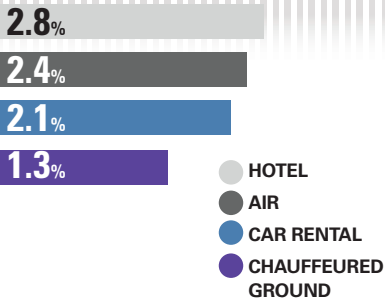


## Travelers Who've Downloaded An App



## How Many Apps They've Downloaded

Of those who've downloaded a travel app



Source: BTN Mobile Migration Survey of 300 travelers, September 2015

A handful of companies choose to ban external mobile travel apps, either in part or whole, some of those preferring to develop their own internal travel apps. Success rates with this strategy have been limited, according to travel managers attending the Innovate conference. Considering the abundance of travel apps available to consumers, travel managers at these companies—often representing highly regulated industries like healthcare, insurance and finance—report slow development and low adoption of internally developed apps. Instead of waiting for internally sanctioned tools on issued devices, travelers go outside the program, downloading consumer apps on their personal devices. The counterargument holds, of course, that because travelers are availing themselves of apps anyway, corporations should manage the system rather than letting travel data roam untrammelled in the wild.

BTN survey data showed, however, that travel managers are not fighting for a breakout role in that effort.

Only 43 percent of travelers pegged the travel management role as “very involved” in setting mobile travel policies, but they failed to identify any other department that was more engaged. Forty-two percent said IT departments were “very involved,” while HR and procurement departments each were much less involved. One option would be to outsource the strategy, relying on a TMC, consultant or third-party technology provider to run the charge, but fewer than half of the travel buyers surveyed said their companies are taking that option.

Companies with very large travel programs have made the most progress, citing higher levels of travel manager involvement in mobile and a willingness to go to outside partners to support overall mobile travel strategies.

### THE VALUE DISCONNECT

Survey data revealed another key issue in corporates’ weak embrace of mobile travel tools. Only about half of travel managers realize how intrinsic to the business travel experience travel apps have become.


Asked to rate the importance of a series of mobile travel functions, travel managers and travelers differed in their value emphasis. Travelers valued the more personal aspects of business travel: itinerary management, destination information and itinerary sharing were all on their top 10 list. For travel managers, functions like expense approval, access to emergency assistance and the ability to deliver travel policy communications figured prominently in the top 10. This result is entirely predictable, but another, more meaningful difference also emerged.

Seventy-five percent of travelers said flight check-in was “very important,” but only 58 percent of travel managers pegged it as equally important for their programs. Taking all functions into consideration to calculate an estimate of the overall importance of mobile functions to each surveyed group, travelers’ average mobile travel importance rating was 67. Travel manager’s average rating was 39.

That’s a huge gap, and one that puts into perspective the 17 percentage

“There are a bunch of assumptions that we need to validate on what makes sense to invest in. In many cases, what you see now is that traveler managers put out a very long requirement list of what should go into an app . . . but we don’t know what travelers want. We have to figure that out.”

— Roadmap CEO Jeroen van Velzen

A black and white photograph of a man in a dark suit standing with his back to the camera, holding the handles of a large glass door. The door is open, revealing a busy hotel lobby with many people walking in various directions. The floor has a circular pattern. The lighting is bright, coming from large windows in the background.

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## Top 10 Mobile Travel Apps

### AMONG TRAVELERS

1. Itinerary management
2. Airline check-in
3. Destination information
4. Booking travel
5. Mobile payment
6. Hotel check-in
7. En-route recovery service
8. Itinerary sharing
9. Travel policy communication
10. Creating and submitting expense reports

### AMONG BUYERS

1. Airline check-in
2. Expense approval
3. Access to emergency assistance
4. Booking tool
5. Travel policy communication
6. Itinerary management
7. Creating/submitting expense reports
8. En-route recovery service
9. Accessing traveler alerts
10. Shopping for travel

Source: *BTN* Mobile Migration Survey of 202 travel buyers between June 23 and Oct. 14, 2015, and of 300 travelers in September 2015

point “importance gap” between travelers and travel managers on the simple issue of mobile flight check-in. Language translation, which did not make the top 10 list of either group, is “very important” to 54 percent of travelers but only 13 percent of travel managers.

After winning *BTN*’s 2015 Innovate Award, Roadmap CEO Jeroen van Velzen summed up the situation. “You need to figure out what your travelers are doing while they are traveling. You might think you know, but you don’t,” he said. “There are a bunch of assumptions that we need to validate on what makes sense to invest in. In many cases, what you see now is that traveler managers put out a very long requirement list of what should go into an app, thinking that is what travelers want, but we don’t know what travelers want. We have to figure that out.”

### SECRET TO SUCCESS: KEYING INTO TRAVELERS’ WANTS

The understanding that travelers may interact with mobile capabilities differently than travel managers expect is key when approaching mobile travel management. To expect those surprises and to be able to balance them with management needs is critical if travel managers want to engage their travelers and drive adoption in whatever mobile travel environment they decide to provide.

It’s also critical to survey travelers in order to serve different types within the mobile travel environment. Hegeman suggests, at first, segmenting by frequent and infrequent travelers, domestic and international travelers and perhaps age groups. Every travel manag-

er, however, will want to segment groups that make sense for his or her travel population.

In *BTN*’s research, for example, less frequent travelers were keener on accessing destination information via mobile apps than were travelers who take 25 trips or more annually. Travelers younger than 35 were more likely to share itineraries and demand social connections while traveling. Frequent travelers, no matter what age, on the other hand, had little desire for destina-

### Who’s Involved In Setting Mobile Travel Policies?

	IT	HR	Proc	TM
Very involved	42%	16%	31%	43%
Somewhat involved	22%	30%	26%	27%
Not very involved	15%	25%	24%	16%
Uninvolved	21%	29%	9%	14%

Source: *BTN* Mobile Migration Survey of 202 traveler buyers, June 23 to October 14, 2015

tion information or social recommendation sharing. Rather, they wanted mobile access to upgrades and amenities at a heavier rate than any other group. Frequent travelers also resisted corporate-endorsed apps the most and had little desire for travel policy communications.

It is critical to engage frequent travelers, the most difficult to influence, in the mobile travel strategy and implementation process. “Getting 40 heavy travelers in a room is amazing. It represents a lot of knowledge,” said Hegeman, who conducts workshops with new clients to dig deeper into traveler

“It’s not really about apps and smartphones. It’s really about understanding the traveler and the travel journey at any point in time and in the context of the decisions they need to make.”

— *TouristMobile* co-founder and managing director Marina Hegeman

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## Buyers Being Innovative

“We have a limited mobile strategy,” said Vanderbilt University travel program manager Sabrina Kronk. “Our faculty and staff have their own devices, and we encourage them to work with the tools that will make them more efficient.”

Kronk has embraced the mobile opportunity from two angles. She has implemented an integrated Concur solution for Vanderbilt’s 7,000 travelers, but she also recommends apps that are outside the Concur ecosystem.

Concur booking, Triplt itinerary management and Concur expense apps launched concurrently at Vanderbilt, but expense proved to be the gateway for Kronk’s travelers. “At first, [travelers] were just using the app for the expense piece, but after a while they started booking as well. We promoted that they could, but they really had to come to that action on their own.”

Vanderbilt travelers also make use of Concur App Center, which gives them access to nearly 130 travel-related apps like ground transportation, dining recommendations and translation services. Travelers can link some of the apps back to the expense tool to streamline reporting, based on clearance from Vanderbilt’s internal security. Kronk recognizes, however, that even a choice of 130 travel apps may not satisfy universal traveler requirements. She solicits app suggestions from travelers and features travel apps as part of a monthly newsletter, where she also promotes and educates her travelers about the overall program, or she tweets recommendations on the Vanderbilt Travel Twitter account.

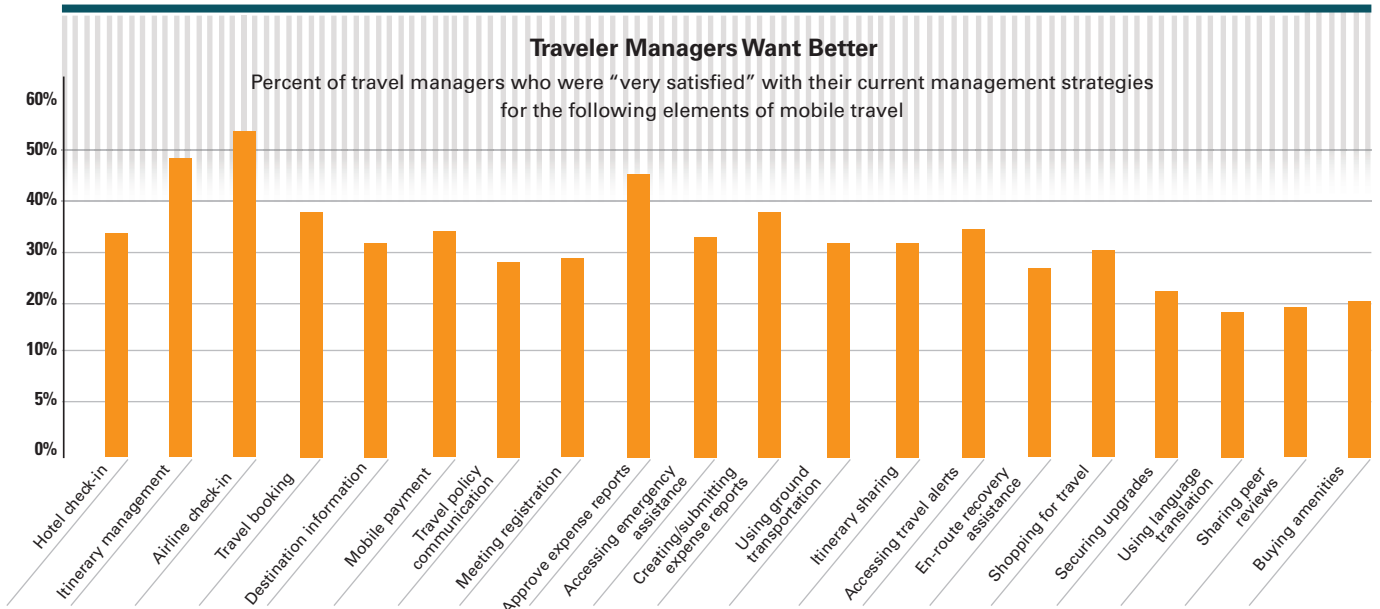
Such an approach offers travelers and travel managers the opportunity to learn from each other to become more aligned and engaged with the program. “We want our travelers to be happy,” she said.

—Elizabeth West

segmentation and workshops with existing clients to mine app-usage data to refine their mobile travel strategies. Plus, she said, “You will be amazed at the ideas business travelers have. They are really smart, and sometimes their ideas need very little effort to deliver.”

Once the traveler information is gathered, the strategy shaping can begin. “This is when the travel manager can say, ‘I like A or B, but I don’t like C and this happens,’” said Hegeman. “It’s fair to say ... ‘It’s not my intention to invest in a certain thing.’ And that’s OK; it’s a conscious decision.” What’s not OK, she said, is the corporation thinking it can shape a mobile travel management strategy from a position of command and control and without delivering what the traveler wants. “That will fail,” she said. “You obviously won’t do everything the travelers suggest, but [you have to make it] a conscious decision when you do something else.”

For some travel managers, it’s a big leap to take, but a necessary one if they want to compete against consumer-oriented travel apps for their travelers’ engagement and deliver on the promise of mobile travel management. [▶](#)



Source: BTN Mobile Migration Survey of 202 travel buyers, June 23-Oct. 14, 2015

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# The Monster Under Your Bed

## Are buyers' data security fears justified, or can collaborators and safeguards help them sleep peacefully?

BY JULIE SICKEL

Too many questions about data security and not enough definitive answers make for corporate travel managers who are paralyzed in the face of mobile strategy.

But just because buyers are standing still doesn't mean travelers are. In April, research from Phocuswright (which, like *BTN*, is owned by Northstar Travel Media) found that two-thirds of business travelers are comfortable using smartphones to make purchases.

"Pretending that mobile apps don't exist or trying to assert policies which ban major ... mobile apps just seems unlikely to receive significant compliance from the average corporate traveler," said Mike Koetting, Concur executive vice president of supplier and travel management company services.

Still, finding the time to devote to the questions at hand has prevented buyers like Financial Industry Regulatory Authority corporate travel services manager Carol McDowell from formally introducing mobile into her program. "What I'm becoming more concerned about ... is what data is out there and how long is it sitting out there? I'm a single-person operation. Technology ... is just changing so fast, and trying to keep up with it—it's just not on the top of my triage list."

She's not alone, either. According to *BTN's* Mobile Migration survey, 53 percent of corporate travel buyers have mobile travel policies around itinerary management, but the numbers drop off for other uses: 46 percent for emergency contact, 42 percent for expense filing and 41 percent for booking or rebooking air travel.

Dart Container travel manager Cheryl

Benjamin soon will implement the first company-endorsed app for expense filing, after having overcome reluctance from her company's executive team, which echoed a familiar refrain that it would "open a can of worms," she said. Ultimately, though, they acquiesced, because while company executives may fear mobile, younger travelers expect it.

the names and driver's license numbers for 50,000 of its drivers during the prior year. Though none of these incidents related directly to mobile security, they've nonetheless fueled conversations around data protection and privacy, and Uber has since created the position of chief security officer. "Anybody who says you don't have to

"Pretending that mobile apps don't exist or trying to assert policies which ban major ... mobile apps just seems unlikely to receive significant compliance from the average corporate traveler."

—Concur EVP of supplier and TMC services Mike Koetting

Concur's Darren Koch, who oversees mobile as senior vice president of global product and platform strategy, added that mobile tech also can benefit travel programs, such as greater traveler adoption and the ability to locate and contact travelers during times of emergency. "The flip side of worrying about the vulnerabilities is sort of endorsing the positive benefits that you get from having a connected set of users through mobile experiences and the ability to reach out to them," he said.

### CONFRONTING THE CONCERNS

In the past year, top travel suppliers have experienced data breaches, including American Airlines, United Airlines, Sabre and Hilton Worldwide. Ridesharing car service platform Uber has had its own spate of troubles, disclosing in February that an unauthorized third party had downloaded

worry about confidential information in an application that you can access via mobile, either through a smartphone or a tablet or a laptop, isn't in touch with reality," said Alan Brill, senior managing director of cybersecurity and investigations at Kroll, a corporate investigations and risk consulting firm. Brill said hackers are getting smarter "at least as fast as the good guys are."

However, there are travel managers who've succeeded in deploying mobile in a way they feel protects their travelers and their company. GoldSpring Consulting partner Will Tate said a number of his clients assuage security concerns by using technology from well-known and trusted travel suppliers. They also invite less risk by avoiding multiple single-use apps and instead going with apps that can do

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## Buyers Being Innovative

While some travel managers stress about mobile deployment and try to control what apps travelers can and cannot use, The Advisory Board Co. vice president of information systems Steven Mandelbaum has implemented his own lack-of-policy policy. Perhaps it's better summed up for travelers as: Do what you want.

"We use TripCase today, so everything gets pushed into there, but short of that they can use airline apps and hotel apps and Uber and all sorts of apps," he said.

The Advisory Board is a bring-your-own-device company, meaning employees are responsible for their own mobile technology, though the company does provide employees cellular allowances based on travel intensity.

Mandelbaum said it's important to use apps for what they're really good at. He deployed Sabre's TripCase because it's good for itinerary management, he said, but he doesn't look to mobile for things like parsing. He likes the idea of an all-encompassing mobile tool, but "until we can get boarding passes in there, which the airlines don't want to do because they consider it part of their experience, you can't get an all encompassing tool," he said.

He added, "We're going to be stuck with this myriad of apps for a long time."

—Julie Sickle

the work of many programs, such as those offered by travel management companies.

"In all my conversations with the major travel supply brands, data security and privacy is of the utmost concern," Koch said, "so [travel managers] are probably in good hands by trusting the major brands out there in the travel space."

Brill said travel managers, when examining an app, should ask how the information is stored.

**"If IT gives you an answer that's just a bunch of letters and numbers that you don't understand ... insist that they explain it to you in a way that you can understand."**

**—Kroll senior managing director of cybersecurity and investigations Alan Brill**

If stored locally, information can be accessed without the Internet, but a device could be vulnerable if lost or hacked. If stored in a cloud system, ask whether information communicated through the program is encrypted, and ensure users sign on via a virtual private network.

"The first thing you want to ask is 'How secure is it, and how is it secured?'" Brill said. "If you can't find that in the documentation that's available to you before you make a decision to use it, how difficult is it to send a question and say 'Look, I know you can't send me all the details, but are all the communications encrypted? Are databases encrypted? What do I need to know about your security?'"

Parexel director of procurement and travel Benjamin Park said his travelers use Concur's mobile app for expenses in a bring-your-own-device environment, meaning the company doesn't provide cellular devices or regulate the apps employees download. He doesn't worry about travelers' individual devices compromising the company because he knows Concur uses encryption and doesn't store its data locally.

Brill said companies concerned about employee-provided devices often install "sandbox" software around work-specific apps, insulating company data and sensitive information. He adds that everyone should have anti-malware software installed on their phones, and apps should be updated frequently for security fixes, as hackers are

targeting mobile devices more.

Finally, Booz Allen Hamilton global travel manager Jack Lever recommended that travel managers use their TMCs as a resource. "If I see a new app, I'll call the TMC and say, 'Is this something you're familiar with?' and, 'Are you working with this particular app? Can you go back to your industry relations, your technology folks and give me some feedback about it, about what your opinions

are? Does it meet security concerns? Does it meet user-friendliness guidelines?' Those types of things."

Colleagues within your own company can help, as well. Travel managers from large companies, in particular, should involve three parties, Brill said: IT, legal counsel and risk management. IT can assist in asking those up-front questions when evaluating an app, such as how the information is stored and whether it's encrypted. "If IT gives you an answer that's just a bunch of letters and numbers that you don't understand, it's never your fault as the travel manager. You have to insist that they explain it to you in a way that you can understand and is not just a bunch of jargon thrown at you."

Corporate counsel, for its part, can evaluate contracts with app suppliers. "The use of apps is so ubiquitous that people come to the corporate environment with the attitude of 'I can download whatever I need and use whatever I need,'" Brill said. "That is not something that you can necessarily live with in a corporate environment. If you're a travel manager, your job is to create the best possible environment for your travelers, but at the same time, you have an obligation to your company to make sure that what you're doing is appropriate in a legal setting."

The risk manager is key, Brill said, because if the company has cyber insurance, risk management can ensure that the company is covered if an incident does occur.

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Travel and Transport is also creating a Big Data solution that aggregates expense and card data with back-office information, then fuses information such as financial data, fuel price data, airline on-time data,



hotel rate projections and more to produce visualizations and predictive metrics that will give travel managers better decision making ability. Our Big Data solution offers a streamlined and systematic approach so companies can have access to a data solutions tool that can effectively change the way customers do business. Travel and Transport foresees this offering having a significant impact on the industry that ultimately will drive the need for us to create a separate business line that will focus solely on Big Data offerings.

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Travel and Transport is an organization that has a vision for continued growth and expansion. Even with these exciting changes, we embrace a culture of passion, where each day our actions must positively impact our employees, clients and partners. Our focus remains on ensuring that the decisions we make hold true to our rich history and tradition that started on the foundation of always putting the customer first.

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# Find The Right Fit

## Proactively decide how mobile can best serve your travel program's priorities

BY MICHAEL B. BAKER

The data is clear: If companies fail to develop a mobile travel program, their travelers will do it without them. Travel buyers, however, can tap travelers' growing appetite for mobile to improve compliance, data and traveler satisfaction.

Further proof that mobile is here to stay: A third of business travelers are Millennials, Mobile Travel Technologies CEO Gerry Samuels said at The BTN Group's recent The Beat Live conference. By 2020, though, "mobile-centric" Millennials will account for half. What's more, mobile is hot in developing markets, as evidenced by growing travel management companies like China's mobile-focused Qunar. "Mobile is just simply the way that people access online," Samuels said.

But mobile technology doesn't have to be a hindrance. Rather, a proactive one

when trips don't go according to plan, said IAC manager of corporate services Rosemary Maloney. "Good apps help in a time of [travel] disruption and aren't just something pretty to look at. You can influence where people stay." A traveler who has to stay an extra day might turn to an external app like Hotel Tonight, she explained, but a managed travel program that includes an app to guide that traveler will help that traveler not only stay in policy but also capture data."

She also likes VisFit, which helps travelers maintain healthy lifestyles, and Dinova's app, which shows travelers restaurant options, as the benefit trickles back to IAC in the form of rebates if IAC travelers dine at Dinova-preferred eateries. Improving the trip for the traveler, as those apps do, is Roadmap CEO Jeroen van Velzen's top metric. "How can I inspire my travelers to

*"Good apps help in a time of [travel] disruption and aren't just something pretty to look at. You can influence where people stay."*

*—IAC manager of corporate services Rosemary Maloney*

can contribute to travel program goals like compliance, traveler service, influencing travel behavior and gathering data. Start by determining and prioritizing what you want your mobile strategy to accomplish: traveler satisfaction and/or compliance, ability to influence traveler behavior, en route support, data gathering, security. And that's just a starter list.

All those benefits come in handy especially

go into places they might not have thought of? What kind of modes of transport do we offer? What is the restaurant around the corner from my office?"

It all comes down to how a piece of technology fits in with a particular travel program's priorities. Some managers may avoid on-demand car service apps like Uber and Lyft, deeming their safety and security measures insufficient for managed



## Buyers Being Innovative

When Egencia first released its mobile app, it lacked some functions that would benefit travelers, said IAC manager of corporate services Rosemary Maloney. She tested it with her most frequent travelers and provided their feedback to the travel management company. Several other travel buyers also gave comments, but Maloney was in a unique position, as IAC once had owned Egencia. "I think [Egencia's] mobile team started to hate me because every week I had an email saying, 'They said that this would make it great,'" she said. "A year later, after us going back and forth, they re-released the app."

For example, the original app provided no capability for last-minute bookings. The newer version included an "assist me" button for travelers that prompts an Egencia agent to call back, traveler information in hand. That's especially useful during a travel disruption. The app also now provides pop-up alerts for such information as gate changes. Maloney continues to provide input to Egencia in an effort to make the app even more intuitive, and she hopes someday it can provide a new itinerary automatically when travel is disrupted.

She also boosted adoption of the app at IAC by packaging it with the security app that enables employees to receive email on their phones. So when they download that app, they also get the travel app. "You never know when you're going to be caught somewhere because of weather and need a hotel that night," Maloney said. "You can book right from your mobile device, and you're staying in policy."

*—Michael B. Baker*

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travel. Other managers might prize the data those apps can provide compared with the notoriously difficult-to-track taxi segment. Others might bow to the fact that business travelers love on-demand car services; consider that such apps accounted for 34 percent of ground transportation spending in the third quarter, compared with 22 percent for taxis, according to Certify's analysis of 8.5 million expense receipts in its system.

**“[Corporates get] caught in the headlights and say, ‘OK, I don’t know what to do with [mobile]. Just let the people sort it. I’m not here to manage it.’”**

**—Roadmap CEO Jeroen van Velzen**

### TO RECOMMEND, REQUIRE, BAN OR BUILD?

The degree to which a travel manager regulates travelers' mobile activity similarly comes down to a matter of style, from totalitarian (mandates and bans) to laissez-faire (purposefully hands off).

One buyer trying to balance company security and traveler preferences surveyed 5,000 of the company's travelers about the apps they already were using, then worked with IT to determine which ones should be banned. However, with input for other buyers, she turned the research into endorsements, as well, providing travelers with information about various apps.

A program that recommends too many

apps, though, can overwhelm travelers. Though a travel management company, Egencia took that notion to heart when deciding how many apps to integrate into the comprehensive one it offers its clients. The aim of an integrated app is “to make it more purposeful and not [to] be going after integration for the sake of integration,” said chief technology officer Sravana Karnati. An example of productive integration, Karnati said, is the Egencia app's

feature that automatically sends travelers to the Delta check-in page and pre-populates the information. Letting travelers take the lead is a viable strategy, too. “As [travelers] use mobile products and talk to travel managers, it becomes more of a discussion within those companies,” he said.

And then there's the option of building a proprietary, comprehensive app, whether internally or with a technology partner. In years past, even the largest corporations found it to be a prohibitively expensive process, said Roadmap CEO Jeroen van Velzen. But a comprehensive mobile platform has big power to influence traveler behavior and drive compliance. That loyalty to preferred

suppliers can stretch to the travel program itself, as well, he said. “The good thing about mobile is: If you can build a truly engaging experience [that's] also from the brand that the end-user trusts, that might as well be your corporate brand.”

When building or customizing a new app, though, remember to heed the travel program's needs. Developers are so focused on what works best for the traveler, they sometimes neglect those who actually will be administering the app, Maloney said. “It has to be viewed as a partnership between the person building an app and the companies using it.”

In fact, buyers should communicate not only current needs but also goals to suppliers, said Jack Lever, global manager of travel and card services for Booz Allen Hamilton, as buyers might have features or services in mind that the supplier could create. “We talk a lot about technology roadmaps with our suppliers,” Lever said. “What is your roadmap? How does that dovetail into our strategic missions?”

For all the forms mobile strategy can take, neither unmanaged programs nor one-size-fits-all solutions that use technology for the sake of technology really work, according to van Velzen. He painted a picture of frequent failures: “The big corporates choose one of the things that get tossed at them from the traditional suppliers, either the online booking tools or the global distribution systems, or they're caught in the headlights and say, ‘OK, I don't know what to do with it. Just let the people sort it. I'm not here to manage it.’”



### Buyers Being Innovative

Joining Grant Thornton as director of travel and meetings this year, travel management vet Margaret Brady has a few pressing priorities, but high on her wish list is a unified corporate mobile travel app, one that is independent of a travel agency.

Many companies offer up a menagerie of travel-related apps to their travelers: a book-

ing app here, an agency app there, an itinerary management tool, a separate expense application. Why not put it all together? Or, in the words of Brady: “One travel app and everything is in that travel app.” Under a single sign-on, Brady wants to lasso in policy and other information that's resident in a company travel portal, booking capabilities, agency support, itinerary management solutions and multiple supplier connections.

Brady buzzes about Roadmap, a tech company that facilitates such integrations and mobile solutions. She's not a client,

at least not yet, but she's hot on the concept. “The desktop portal that you see today in your office, you put in your phone,” she said. “All the information—surveys, travel policies—it's taking your desktop and putting it on your phone because nobody is looking at their desktop. If you keep it simple from that perspective and then you start working on the traveler experience, then there are all those opportunities to build different connections and different kinds of solutions.”

—Jay Boehmer

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# Who Ya Gonna Call?

## TMCs, GDSs, third parties or all of the above

BY JoANN DeLUNA

"I don't understand why people aren't doing it," ACT corporate travel senior manager Jennifer Steinke said of developing a mobile strategy. "Stop waiting and just do it."

Her philosophy may be more liberal than many travel managers', but that doesn't mean she's less concerned than them about risk management, trip disruptions and improving the travel experience. When working for US Foods, Steinke collaborated with the IT department and telecommunications manager to develop a mobile strategy that would address these concerns and monitor what she calls the "consumption period of a trip," which begins when the traveler leaves the nest. "Most travel managers pay little to no attention to when travelers are actually traveling," she noted.

### ONE-STOP SHOP

When Steinke was forming US Foods' mobile strategy, she wanted to avoid full dependence on a travel management company. "I firmly believe in unbundling my program and the technology because if I want to move it to a different TMC, I don't want to have to reinvent the wheel," she explained.

US Foods was an early adopter of itinerary management mobile tool TripIt and mobile communications messaging platform conTgo. Concur acquired them in 2011 and 2013, respectively, making the supplier a natural technology partner for Steinke's mobile program. Now working at assessment testing organization ACT, she's implementing Concur Travel and Expense, as well as a similar mobile strategy there, as well.

Steinke admitted ACT may rely too much on Concur, but, she said, it's an industry leader with a comprehensive suite of tools that's easy to implement. "We can have a one-stop shop with Concur, and it's cost effective right now for ACT to do that," she said.

She hopes the app someday will enable her to communicate with travelers to help them make the "best decisions" while traveling, a method she calls "en route procurement." This includes light touches like location- and time-specific push notifications that, say, breakfast and Wi-Fi are included with ACT's hotel discount or that a train is more economical than a taxi for the ride from the airport. She'd also like to send restaurant recommendations and other advice based on internal traveler data.

### THE TMC ROUTE

For about a year, the University of Washington has used Christopherson Business Travel's AirPortal 360 platform, which integrates with Concur's TripIt and works on both desktops and mobile devices. In the time it takes to get a coffee across the street, Crow can check whether any of the university's 20,000 to 25,000 travelers is headed for a weather-related disruption, request that travelers and associated agents rebook affected flights, forward itinerary information to agents and, in emergencies, ensure travelers are safe.

Previously, Crow would sort through emails and call admins until he found the one who worked on a booking, and he relied on his memory for trip details. "It's just a very different dynamic to be able to utilize the app and look up the info while

### > JENNIFER STEINKE'S MOBILE STRATEGY TIPS

You cannot lose sight of the fact that mobile is personal.

I don't discourage travelers from seeking out apps that make their lives easier. If I see an overwhelming majority of people who like a particular app, I may promote that to other travelers.

Don't rely so much on the travel managers to tell travelers what apps they should or shouldn't use because travel is such a personal experience. Get feedback from your travelers. There's no point in wasting your time to make sure you're bridging the gap between what you're offering and what your travelers' needs are.

Align your program to the overall business objectives. Most people don't do it that way; they build it by industry standards. My program ... should look different because my company is different.

### > PETE CROW'S MOBILE STRATEGY TIPS

Take a look to see what travelers are already using to see if you have a potential solution to roll out to those who are not already using it.

Have clear documentation of what the app does and doesn't do, and set clear expectations on how this will make [travelers'] lives easier and that it's not going to be the solution that makes life perfect.

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I'm walking down the street," Crow said. "It's a duty-of-care functionality but also just a logistics functionality."

The university didn't prioritize a desktop/mobile platform in its request for proposals for a TMC, Crow said, but the tool definitely contributed to Christopherson's victory. He acknowledged the system's faults: His program, like most, has leakage, while AirPortal 360 works only with

where switching TMCs isn't necessary."

Lately, said Evan Konwiser, digital traveler vice president for American Express Global Business Travel, larger TMCs, his own especially, have invested in mobile technology with their eyes on data integration and a seamless experience that third parties previously were not capable of. "A TMC in many ways is an aggregator of technology, content and data for our corporate clients, he said. "We're in the center of the corporate travel ecosystem, bringing it all together and implementing it seamlessly for our clients." The more active role a TMC plays in solutions like mobile, the easier it will be for corporations to implement the TMC and the more benefits the corporation will receive.

"I firmly believe in unbundling my program and the technology because if I want to move it to a different TMC, I don't want to have to reinvent the wheel."

—ACT corporate travel senior manager Jennifer Steinke



### Buyers Being Innovative

When a tired traveler comes face-to-face with a weather-related travel mishap, change fees and expensive last-minute tickets rack up trip costs. That's leaving money on the table, considering rebooking fees related to weather events often are accounted for in the original ticket. ACT corporate travel senior manager Jennifer Steinke is working with Short's Travel Management to avoid such excesses.

On the platform they're building, the TMC would rebook an ACT traveler automatically and email or text the new information to him or her. "It's that type of proactive disruption stuff that is one of the biggest focuses and benefits for travelers," Steinke said. Otherwise, a frustrated traveler might act rashly expedite the trip home. "Instead of doing something free because you've already bought the ticket, now you're looking at \$1,100 just to get home."

—JoAnn DeLuna


in-channel bookings. Additionally, users can't change trips within the app. "But," he said, "it's apps like this that allow us to make a case to all levels within the organization that it's only within this functionality that we're able to take best care of our travelers because, if you're off doing your own thing, it becomes more difficult to be able to respond effectively when things do come up," Crow said.

While Steinke wanted to avoid partnering with a singular TMC, Crow found benefits in doing so. For one, Christopherson's full integration into the university's travel program means more visibility. The close partnership also makes it feasible to customize tools. The companies have been working together to push smartphone trip-authorization notifications to those in the approval chain.

"We bring people on to the platform to have faster trip approval, which gets them into the ecosystem for other functionality that's available or becomes available," Crow said. "Obviously, being fully dependent on a TMC makes a migration challenging," Crow said, "but my argument against that is: If you have a TMC heavily invested in your travel program and willing to make the changes to meet your business requirements, the goal is to deepen the relationship to the point

#### THE GDS OPTION

Cisco Systems partnered with global distribution system Sabre to create a booking solution for air, hotel and car and to launch Cisco's first mobile tool. The companies already had a strong partnership, which developed as Sabre entered markets Cisco needed, such as Africa and India, according to senior global travel manager Carlos Almendros. Plus, most of Cisco's travelers already were using Sabre's TripCase booking tool. Thus, implementing another tool from the same supplier would be easy. Sabre's willingness to listen to Cisco's needs sealed the deal. "It was an easy discussion to have with Sabre because they were willing to work with our internal mobility team and accept that maybe they didn't have the right interface and functionality," Almendros explained.

He added that it didn't make sense to partner with Cisco's TMC, Amex GBT, to create a mobile platform because Cisco's three geographic travel hubs are serviced on Sabre's platform. That doesn't mean he's ruling out Amex GBT, which he said is a different company than it was two years ago. "We're looking to partner with the right technology solutions, and Cisco has a vision that travelers should be able to come into travel like an Amazon marketplace where it knows your profile and is more intelligent," he said. 

# BUSINESS TRAVEL TRENDS & FORECASTS

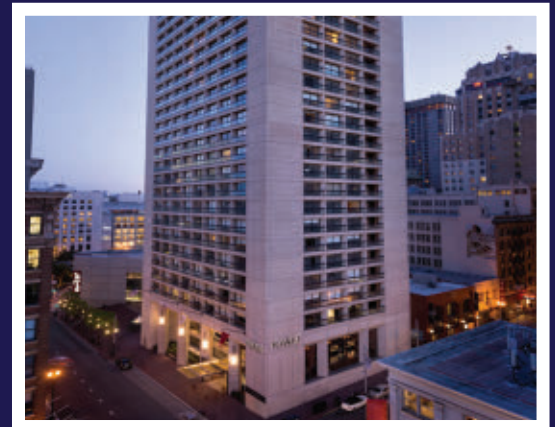
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# Are Wearables For Real?

## Smartwatch travel apps abound, but adoption is a work in progress

BY JAY BOEHMER

As corporate travel buyers assess mobile strategy, they have rightly recognized smartphones and tablets as the primary touch points. Yet, the very notion of mobile is broadening to include watches, bracelets, glasses and other devices that comprise the emerging category of wearables. Doubts abound on adoption, potential and utility—what can a watch do that a phone can't—but early boosters from the travel segment see a category worthy of consideration, a new way to deliver travel services and even a powerful new touch point to communicate contextual messages to managed travelers.

One in five U.S. adults already uses a wearable device, according to a Forrester Research survey of 952 consumers that was released in September. Yet, among the adopters, the most widely used were the Fitbit (36 percent) and Nike's FuelBand (16 percent)—two wrist-worn devices squarely in the health and fitness realm. While a Fitbit can monitor your heart rate, it won't alert you to a gate change for your next flight or help you request an Uber.

"Wearables will take off first on the health side," said Travel Tech Consulting president Norm Rose. "Travel as an industry itself is not going to drive the adoption of wearables. That's despite the fact that the major airlines, the itinerary aggregators and hoteliers have all created Apple Watch apps and are trying to be ahead of the curve."

While there are other notable wearable technologies worthy of consid-

eration—Samsung Galaxy Gear, for example—many, including Rose, view the Apple Watch as a bellwether, considering Apple's history for defining, if not inventing, consumer technology categories.

According to the Forrester survey, 16 percent of wearables adopters use the Apple

experiment, but Rollins said, "Wearables, whether it's glass or another form, will continue to evolve and become more affordable. [Google Glass] came out at \$1,500, which was incredible, and the battery life was terrible. But wearables are here to stay."

Travel suppliers have awoken to the promise of smartwatches. American Airlines has enabled baggage claim and gate change notifications, as well as boarding passes, on the Apple Watch. Uber users can request a ride and receive car-arrival notifications on Apple Watch. Smartwatch-wearing Starwood Hotels & Resorts guests can unlock hotel room

*"If you're a high-tech company in Silicon Valley, you might have more early adopters."*

*—Travel Tech Consulting president Norm Rose*

Watch. While its arrival in April generated plenty of buzz, consumer adoption thus far has not met the lofty expectations. "The Apple Watch, which we were anticipating would be a smash, was pretty slow as far as adoption," said Rose.

Indeed, in August, UBS equity analysts found that consumer interest in the Apple Watch, based on consumer Web searches, was "lower than for earlier Apple products, as well as many consumer electronic launches."

Of course, as with many emerging technologies, smartwatches may evolve into something better, more pervasive and cheaper.

"Wearables come in various shapes and forms," Sabre Hospitality Solutions general manager Cassandra Rollins said, a Google Glass set in hand, during the Global Business Travel Association conference in Orlando this summer. Google ultimately abandoned Google Glass, an early and buzzed-about wearable

doors, at least at some properties, and check-in and review reservation details. Hotel Tonight lets wearable wearers book last-minute hotels.

"Airlines and the other sectors have been out of the gate with the watch really fast," said Rose. "They're trying to keep ahead of the curve, but the curve hasn't even started to climb enough."

A few tech products used in the corporate realm also have positioned their wares for watches. Sabre's TripCase and Concur's TripIt itinerary management tools support various smartwatch platforms, enabling travelers to see upcoming trip information and receive notifications.

"If we look at innovative technologies broadly, we have an obligation to explore them and make sure that we're ready for them as they come along," Concur senior vice president of global product and platform strategy Darren Koch said. "So for things like Apple Watch and Samsung Gear, we've done product releases on TripIt

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because they're more end-user-facing tools for the traveler. We'll continue to use brands like TripIt and ExpenseIt to explore emerging technologies, as well as other groups within Concur. Some of those things will work; some of them won't. Some of them will get wide adoption, and some won't."

Though the company is tinkering, it's clear Concur isn't chasing wearables with the same vigor as it did smartphones. Koch noted that the Apple Watch is "not something to bet against, but when you think about the number of smartphones out there and the number of watches, it's hard to justify huge investment in that platform as it stands now."

Travel management companies may have a reputation for being slow to

things where you go to check into a hotel and the traveler gets a message on the watch that says, "Remember that you have free Wi-Fi and free breakfast at this hotel."

Travel and Transport president and CEO Kevin O'Malley interjected, "Or, 'Don't forget to fill up your car before you return it so that you can save your company money.'"

Fleming continued, "Those kind of things that are pertinent to where that person is, from a location or timing standpoint—we think there's some good things like that that are coming."


TMCs and buyers may even have an audience, as many early wearables adopters also happen to travel for business. According to *BTN's* Mobile Migration

On the other hand—or wrist—there are plenty of travelers who, according to Phocuswright, "are reluctant to add another device to their lives." Of the research group's survey respondents, 35 percent weren't interested in adopting wearables anytime soon. "Business travelers pack light, so any new device has to provide serious value," wrote Phocuswright. "Given that the majority of business travelers already own two or three devices, adding a wearable and its accompanying paraphernalia like chargers and cables to an already crowded briefcase is something many travelers will think carefully about."

Count Hickory Global Partners president Chris Dane in their company. "I don't get what I get in a wearable that I don't have on my phone," he said during The BTN Group's recent The Beat Live conference. "I don't think the wearables are very attractive as a piece of jewelry, if you will, so if I have it on my phone, why do I need a wearable?"

If wearables turn out to be the next big thing, they're not there yet, giving travel managers some time to grapple with the potential implications.

"It's early enough that we're not going to be blindsided with a wearable explosion, as happened with the smartphone explosion in 2008," said Rose. "The corporate travel buying community is still trying to recover from that. I don't think they need to be concerned that, six months from now, wearables are going to blow apart the way they manage travel."

Even so, Rose encouraged managers to understand what their travelers are using and how. "If you're a high-tech company in Silicon Valley, you might have more early adopters." He indicated the biggest thing corporate buyers should keep in mind about smartwatches: "Their role has to go beyond delivering the tickets and the reservations through their TMC. There has to be a better way to communicate with frequent travelers on the road." Travel managers don't need to worry too much about wearables yet, he said, adding, "What I would be concerned with is [if] they don't have a mobile strategy at all." 

**"If we look at innovative technologies broadly, we have an obligation to explore them and make sure that we're ready for them as they come along."**

**—Concur SVP of global product and platform strategy Darren Koch**

respond to consumer technology trends, but at least one has released a smartwatch companion app to its mobile arsenal. "We're spending a lot of time and money on the mobile side," said Travel and Transport COO Tim Fleming. "We continue to see that as the future of a lot of technology. So much of the technology that's been developed over the years in the industry has been built around the management of the program itself: tools and solutions for the travel manager, for procurement. We're spending a lot of time now continuing in that area but really trying to get more in the hands of the traveler."

Travel and Transport's Apple Watch capabilities include displaying upcoming trip details. The company also touts some air and hotel check-in capabilities. Yet, the functionality could go further to allow communication between travel manager and traveler. "We see it more than just being your boarding pass or your flight itinerary," said Fleming. "We're envisioning

survey of 300 travelers, 20 percent own a smartwatch. Sure, that pales in comparison with the 98 percent carrying a smartphone and the 77 percent wielding a tablet, but it's early.

A separate study published in April by Phocuswright (which, like *BTN*, is owned by Northstar Travel Media) showed business travelers adopting wearables at a faster pace than general consumers were. According to Phocuswright's online survey of 975 qualified respondents, fielded late last year, 15 percent had a wearable device versus 9 percent of overall consumers. The Phocuswright survey showed that 66 percent planned to acquire a wearable device "in the next few years."

One adopter is The Advisory Board Co.'s Steven Mandelbaum. "It works," he said, even if some supporting infrastructure doesn't. "It's a little hard to put your arm on the TSA scanner, and certain airlines have bar code scanners where your arm just doesn't fit in it. But, yeah, I can see it being very useful"

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