

# BTN

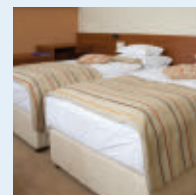
BUSINESS TRAVEL NEWS



## SMALL & MIDSIZE ENTERPRISES

Is the one-page travel policy a myth, or reality? Here are pros, cons and advice for SME travel managers who want to chase the dream.

PAGE 12



## LODGING

Now that the U.S. Department of Justice and Federal Trade Commission have given the go-ahead to the Marriott-Starwood merger, what concerns travel buyers?

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## VOICES

BTN's new quarterly feature, What the Traveler Thinks, captures travelers' real thoughts about who's responsible for traveler tracking.

PAGE 24

## FEATURE



FULL STORY ON PG 8

BY JOANN DELUNA

# Traveler Tracking

2015 was an eye-opening year for corporations in terms of traveler duty of care. iJet International counted nearly 6,000 travel disruption events for the year, up 13 percent from 2014. It was the high profile of a handful of events that had the most impact on awareness, however. Terror attacks in Paris alone spurred more than half of the travel managers *Business Travel News* surveyed either to review their traveler tracking tool set or to consider expanding their tracking policies.

Aggressive tactics like tracking the GPS signal of a mobile device require privacy considerations and traveler opt-in. While high-tech solutions offer real-time information and effective ways to connect immediately with travelers, they aren't a full solution. Travel management company itinerary data plays a critical role in tracking where travelers plan to go; booking through the TMC remains a high priority for travel managers.

Peace of mind comes with locating travelers, but once a corporation knows that a traveler is in crisis, it must be prepared to respond.

## Corporate Travel Demand & Macroeconomics in 2016

BY MICHAEL B. BAKER

At a cursory glance, the diagnosis for global corporate travel demand looks healthy. Global air traffic posted its strongest year-over-year growth since the recovery from the 2008 U.S. financial crisis, and hotels in many global regions are seeing record occupancies.

At the same time, threats to that growth loom, and there are murmurs of a global recession on the horizon. While low oil prices can stimulate demand through lower travel costs, they also are causing heavy travel cutbacks from the energy sector. China's behemoth economy, meanwhile, is teetering toward recession, which would bring global demand repercussions, as could the United Kingdom's potential exit from the European Union later this year. The Zika virus, too, has emerged as a pandemic threat.

### Signs of Strength

For now, chief executives from both airlines and hotels continue

to express optimism in their corporate travel demand outlook for 2016, at least relating to clients outside the energy sector. "We're pretty optimistic relative to what you see on CNBC or in *The Wall Street Journal*," Delta Air Lines CEO Richard Anderson said during the carrier's fourth-quarter earnings call. "We are booked ahead in terms of load factor for each of the months for February, March, April and into early summer. Core demand strength seems very strong in terms of corporate."

Similarly, American Airlines president Scott Kirby reported "sizable increases" in corporate travel volume during the fourth quarter and said he expected corporate demand to grow this year.

On the hotel side, Marriott International president and CEO Arne Sorenson said room sales from the company's 300 largest corporate

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DELTA PRESIDENT OF INTERNATIONAL STEVE SEARS DISCUSSES THE COMPANY'S COMMITMENT TO CORPORATES

"We are committed to our easy-to-do-business-with strategy. Part of that will be continued simplification of contracts ... and continued leveraging of our technology investments to improve our B2B partnerships."

## 6 | Data Hub

### EMD Sales

Electronic Miscellaneous Document sale transactions that United States-based travel agents booked through ARC, including ticketed ancillaries like seat upgrades, have skyrocketed.

January 2015 **7,100**  
January 2016 **42,000**



up **491%**

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BUSINESS TRAVEL NEWS



A STAR ALLIANCE MEMBER 

## commitment worth smiling about

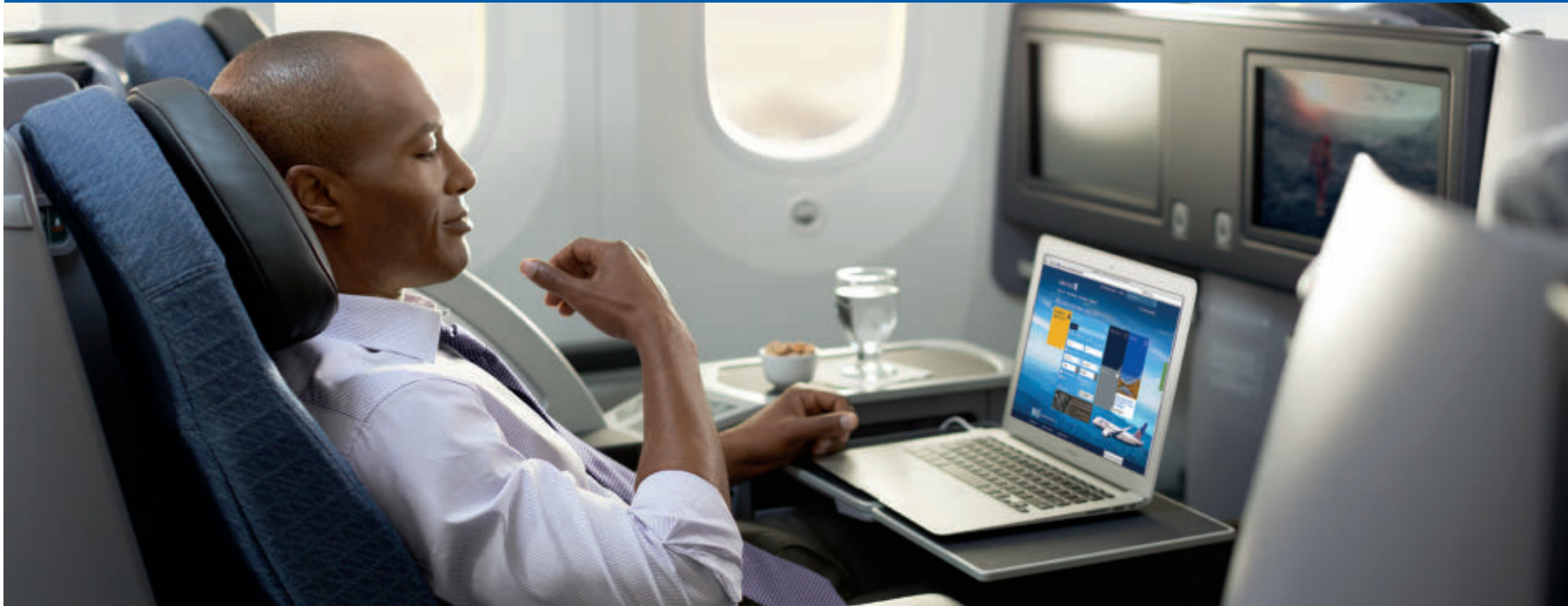
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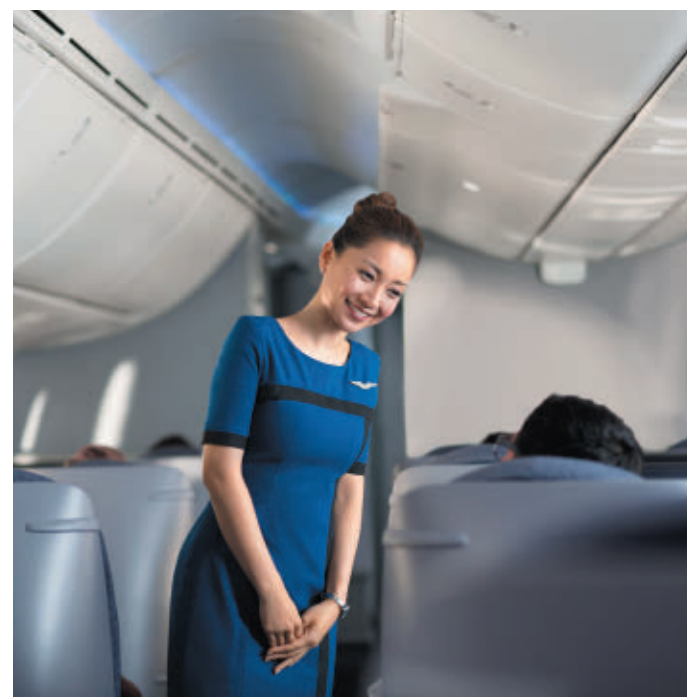
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## Value-Added Tax Company Partners with MasterCard

BY AMON COHEN

VAT IT will roll out a global partnership with MasterCard, whose data represents a breakthrough for the notoriously cumbersome recovery of foreign VAT, according to the value-added tax specialist.

Following a pilot with an Asia/Pacific-based client, VAT Cloud covers claims in 24 Asia/Pacific countries initially. VAT IT has not yet provided a timetable for the rest of the global rollout.

VAT recovery typically is manual, but VAT Cloud can use an automated feed from clients' MasterCard reports to evaluate for VAT yield, the total amount of VAT a company can reclaim. The card data also becomes the basis of claims forwarded to foreign tax offices, furnishing such details as supplier name, address and registered VAT number, as well as total amount spent.

"MasterCard has the data we need to make claims and understand the full potential for what there is to recover," said VAT IT U.K. managing director Greg Magid, who leads the MasterCard partnership. "The key fields we need to populate the claims are included in the MasterCard data." Philip Glickman, MasterCard head of commercial products and solutions for Asia/Pacific, said, "The seamless automated process also provides a

**"MasterCard has the data we need to make claims and understand the full potential for what there is to recover."**

—VAT IT'S GREG MAGID

paperless and fully digital trail, such that you can trace every step of the process down to granular detail."

Card data can be insufficient to assess the correct recovery amount for payments, especially hotel bills, if they lack line itemization. This is not a problem in countries where VAT applies uniformly to all items on a hotel invoice, but in some countries, VAT may apply differently to the room rate and dining charges or VAT may be charged on dining but not recoverable.

However, the biggest barrier to full automation of foreign VAT recovery is the requirement to submit receipts. In recent

Value-added tax =

**5%**

of the average cross-border business trip, according to KPMG.

Half of companies recover

**50%**

or less of the VAT they incur, according to the Organisation for Economic Co-operation and Development.

years, scanned receipts have become acceptable, and VAT IT partnered with expense management companies like Concur in 2014 and Certify and Xpenditure in 2015. These partnerships allow travelers to photograph invoices with their phones, and VAT Cloud now uses optical character recognition and algorithms to match the receipts to MasterCard data while also completing empty data fields in the claims, Magid said.

As with the MasterCard arrangement, this data can be used to prepare spreadsheets indicating potential VAT yield for each line item and acting as the basis for claims. Inevitably, however, the accuracy will not be as good as for a direct card feed.

All but the United States and a handful of countries, mainly in the Middle East, charge VAT. KPMG has estimated that VAT accounts for 5 percent of the average bill for a foreign business trip. The Organisation for Economic Co-operation and Development estimated that half of companies recover only 50 percent or less of the foreign VAT they incur. Magid said VAT IT recovered VAT on 577,038 hotel invoices and 269,392 restaurant bills in 2015. Like its competitors, the company earns revenue by taking a percentage of the VAT it recovers.

Other companies also have added automation to the process. Taxeo, for example, feeds electronic invoices from hotels into recovery claims.

VAT IT is considering other ideas that could take automation further, such as linking to dining payment apps like Velocity, which is also a Concur partner, that could transmit a restaurant bill into a VAT report. The company is tripling its IT budget this year, but Magid tempered expectations, noting, "A completely paperless environment is not yet legally possible." ■

### NEWS BRIEFS

#### U.S. Carriers Can Fly to Japan's Haneda During the Day

The United States and Japan are amending their Open Skies agreement to allow U.S. carriers to operate daytime flights at Tokyo's Haneda Airport for the first time since 1978, according to the U.S. Embassy in Tokyo. Four arrival/departure pairs will shift from nighttime, and the agreement adds a fifth daytime slot. U.S. carriers also can maintain one total night slot pair at Haneda. Daytime flights could begin as early as the fall.

#### U.S. Carriers Can Apply for Cuba Service

In Havana, U.S. Transportation Secretary Anthony Foxx signed an arrangement to re-establish scheduled air service between the United States and Cuba for the first time in more than 50 years. It allows U.S. carriers to operate a combined

20 round-trip flights a day between the United States and Havana and 10 daily between the United States and each of Cuba's nine other airports, a total of 110 round-trip flights, according to the U.S. Department of Transportation. Carriers now can apply for the service slots, which the DOT expects to award this summer.

#### UN Agency Sets Aircraft Carbon Limits

The United Nations' International Civil Aviation Organization aims to cut aircraft carbon emissions by more than 650 million tons. According to the ICAO, large, long-haul commercial aircraft account for more than 90 percent of international aviation emissions. Its new standards will apply to all aircraft designed in 2020 and beyond and to aircraft in production beginning in 2023 and are subject to approval by its governing council.

# Steve Sear, Delta President of International, on Continuity for Corporates

**Recent changes in executive leadership at Delta Air Lines show the depth of the carrier's bench. Confident in its current strategy, Delta plans to stay the course on such priorities as employee engagement, commitment to corporates and integrated alliance partnerships.**

**RICHARD ANDERSON WILL TRANSITION TO THE POSITION OF EXECUTIVE CHAIRMAN IN MAY, AND ED BASTIAN WILL TAKE THE HELM AS CEO. THERE ARE A HOST OF OTHER CHANGES DOWN THE BENCH, AS WELL. CAN YOU BOIL DOWN WHAT THESE CHANGES MEAN FOR CORPORATE CLIENTS?**

The Delta leadership succession has been very effective. Richard is retiring in May and we are going to miss him, but he leaves a great legacy: The Flight Plan, Rules of the Road, The Way We Fly. What's been the driver in this transition is the depth of the leadership team. We have Ed [Bastian] as the CEO. [He and Richard Anderson] have been working together hand in hand for the past decade. With Glen [Hauenstein] appointed to president and Gil [West] appointed to senior executive vice president and chief operations officer, it shows the commitment and continuity that Delta is going to provide for corporate customers. We continue to be confident in our strategy, and we are going to stay the course. We focus on our employees and having them the most engaged. They take care of our customers, and that, in turn, takes care of our shareholders. We are going to stay focused on our culture and making sure Delta employees are the best in the industry.

**YOUR POSITION HAS CHANGED, AS WELL. AS PRESIDENT OF INTERNATIONAL AND EXECUTIVE VICE PRESIDENT OF GLOBAL SALES, HOW ARE YOUR RESPONSIBILITIES CHANGING?**

I'll remain focused on our global sales activities for the corporate and agency community. The globalization is the natural outcome of where our corporation and agency partners are growing and moving, as well. As we expand our programs and initiatives worldwide, we will do that organically—and more so with our alliance partners. Where we are making those investments—whether in China, Mexico or Brazil or the U.K.—those investments are in the markets where corporate travelers fly.

**DELTA HAS ONGOING JOINT-VENTURE INITIATIVES AND EQUITY PARTNERSHIPS IN THOSE MARKETS. HOW ARE YOU LEVERAGING THEM, AND HOW DOES THE NATURE OF THESE PARTNERSHIPS BENEFIT CORPORATE CLIENTS?**

Delta has the most integrated joint ventures, where we share bottom lines. That makes the companies in the joint venture think about the customer first and foremost. Unique also are the equity positions that Delta has taken in [some] alliance partners. Virgin Atlantic is an example where we were able to quickly work together



**Delta President of International & EVP of Global Sales Steve Sear Talks**

- His new role
- Making investments where corporate travelers fly
- Delta's commitment to performance excellence

to provide seamless service between the U.K. and the United States. You will see similar activities in Mexico [with Aeromexico], pending government approval of the joint venture and [antitrust immunity], and continued focus in Brazil with our partner Gol. We also will continue to build our connectivity and joint programs with China Eastern with its core hub in Shanghai.

**ON THE INTERNATIONAL FRONT, HOW WELL IS DELTA POSITIONED TO COMPETE?**

We are positioned incredibly well. In Latin America, we just won three Latin trade awards as the best North American airline. ... In Asia, we just won awards with TTG China among others, and as we build out our China Eastern hub, we'll continue to increase our brand presence there. In Europe, [we have] the most integrated and effective joint ventures, with AF/KLM Alitalia and to the U.K. with Virgin Atlantic. But this is the most competitive and complex industry in the world, and that's what makes it fun.

**ON THE DOMESTIC FRONT, UNITED HAS RESPONDED TO DELTA'S OPERATIONAL PERFORMANCE COMMITMENT. PLUS, UNITED POSTED IMPROVED PERFORMANCE NUMBERS OUT OF THE GATE IN 2016. HOW IS THAT SHAPING UP?**

We are by far the most reliable airline, and at the core are the Delta people. ... They are the most engaged and committed to providing on-time service. In 2015 for the calendar year, we were No. 1 both in the completion factor and arrival categories, and that trend continued in January when we were No. 1 [in those categories again]. If you look at Winter Storm Jonas, we had the fewest cancels in the New York area: [Delta had] 2,000, while some of our competitors had up to three times that. We were the first to operate after the storm on Monday, when most carriers didn't open up until Tuesday. That shows not only our commitment to operational excellence on "blue sky" days but our ability to perform when situations are not ideal. We are confident that we will continue to lead the industry. It also shows our corporate clients that [in terms of] the total cost of travel, above and beyond the contract, Delta provides a better savings proposition because of the reliability.

**"We are so bullish with the opportunities we have with our alliance partners, and our level of integration with them is unprecedented. This will help us find opportunities to enhance our value proposition for customers."**

**WHAT ARE YOU WATCHING IN 2016?**

On the sales front, we are committed to our easy-to-do-business-with strategy. Part of that will be continued simplification of contracts, continued 24/7/365 sales support on a global basis and continued leveraging of our technology investments to improve our B2B partnerships. On the global front, we are so bullish with the opportunities we have with our alliance partners, and our level of integration with them is unprecedented. This will help us find opportunities to enhance our value proposition for customers and our overall performance. ■

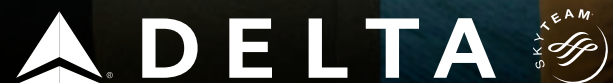
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KEEP CLIMBING



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# Airfares, Ancillary Costs & Extras

## AIRFARES SINK WHILE ANCILLARIES SOAR

United States-based travel agents booked less in airline transaction dollar volume year over year ...

January 2015 **\$7.7 billion**  
January 2016 **\$7.3 billion**  **down 4.3%**

... while the number of transactions rose, reflecting lower airfares.

January 2015 **13.4 million**  
January 2016 **13.9 million**  **up 3.9%**

Source: Airlines Reporting Corp

Sales of ticketed ancillaries, including upgraded seats and checked luggage, skyrocketed, according to Electronic Miscellaneous Document sales. That goes for both dollar volume ...






January 2015 **\$862,000**  
January 2016 **\$2.8 million**  **up 224%**

... and number of transactions.

January 2015 **7,100**  
January 2016 **42,000**  **up 491%**

## CONNECTIVITY & COMFORT IN ECONOMY CLASS

Travo examines the inflight experiences of seven popular U.S. airlines' mainline aircraft

	 <b>Wi-Fi</b>	 <b>Power Outlet at Each Seat*</b>	 <b>Entertainment</b>	 <b>Food &amp; Beverages</b>	 <b>Legroom</b>
<b>Alaska</b>	\$16/day	Yes	Free & for purchase	Free drinks Food for purchase	32 inches
<b>American</b>	\$16/day	Yes	Free & for purchase	Free snacks & drinks Food for purchase	31 to 32 inches
<b>Delta</b>	\$16/day	USB ports	Free & for purchase	Free snacks & drinks Food for purchase	31 to 32 inches
<b>JetBlue</b>	Free \$9/hour for VPN, cloud storage, online games & streaming	Yes	Free DirecTV Amazon Prime (for purchase for nonsubscribers)	Free snacks & drinks Food for purchase	32 to 33 inches
<b>Southwest</b>	\$8/device	No	Free live & on-demand TV \$5/movie	Free snacks & drinks Food for purchase	30 inches
<b>United</b>	Varies	Yes	Free DirecTV	Free snacks & drinks Food for purchase	30 inches
<b>Virgin America</b>	\$16/day \$5/hour	Yes	Free & for purchase Netflix for subscribers	Free drinks Food for purchase	32 inches

\*Travo marked as "Yes" those airlines that currently provide power outlets at 90 percent of seats and will provide outlets at all seats by the end of the year.

**3<sup>RD</sup>**  
**ANNUAL**

# BUSINESS TRAVEL TRENDS & FORECASTS

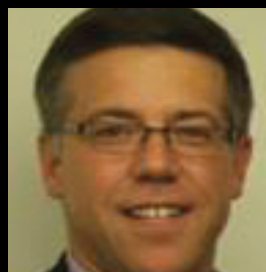
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Business Travel Trends & Forecasts Washington DC is a one-day, buyer-focused conference designed to enhance your corporate travel and meetings program by uniting industry peers and providing a platform for information sharing.

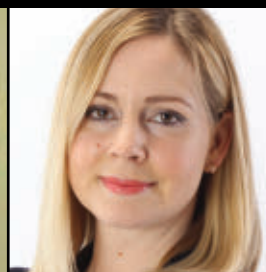
- **Discuss original BTN research into the adoption of advanced mobile travel management strategies, policies and practices**
- **Explore airline industry trends and forecasts**
- **Gain valuable insight on hotel trends and what they mean to buyers**



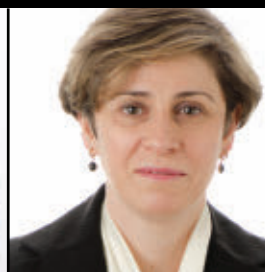
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# TRAVELER TRACKING: WHERE ARE YOUR TRAVELERS RIGHT NOW?

By JoAnn DeLuna

Two weeks after Lucy Mosca was hired as FTI Consulting's global travel manager last March, a Germanwings airplane en route to Barcelona crashed into a mountain in France, killing all 150 passengers. At the time, employees weren't mandated to use FTI's travel management company, BCD Travel. Only half of FTI's 4,500 employees knew they had a travel management company and actually used it to book travel. Mosca walked into a board meeting to a slew of questions.

"I have no way of knowing where people are unless they're using our agency. I can tell you I'm 60 percent sure we didn't have anyone onboard the plane," she told the board. "How does that make you feel?"

The board was taken aback. FTI pledged to issue a mandate requiring employees to book travel through BCD, which FTI uses in North America, Hong Kong and Australia and is implementing in Latin America. The mandate wasn't yet in place, though, when an Amtrak train derailed in Philadelphia two months later or in November when terrorists attacked Paris.

FTI employees were safe in all three incidents, and the company issued the agency mandate in December.

## NO WONDER AWARENESS HAS GROWN

"Last year, it seemed like every month there was some major thing, and that's just what the average person sees," said George Taylor, vice president of global operations for travel risk management and security firm iJet. "There are many other events that take place worldwide that aren't raised to everyone's attention." According to iJet, 6,000 travel disruptions occurred in 2015. Add duty-of-care regulations and increased international travel, and companies are homing in on traveler tracking.

A *BTN* online poll of 204 travel buyers in January revealed that 71 percent track

***"I can tell you I'm 60 percent sure we didn't have anyone onboard the plane. How does that make you feel?"***

—FTI'S LUCY MOSCA TO THE COMPANY'S BOARD AFTER THE GERMANWINGS CRASH

travelers using TMC itinerary data, 30 percent use credit card data, and 12 percent use GPS via tools that tap into travelers' mobile devices. Seventeen percent aren't tracking their travelers, and others have traveler safety and security programs with providers like iJet and International SOS, which use data from TMCs, airlines, hotel aggregators and others to track traveler whereabouts and provide emergency assistance.

After the Paris attacks, however, many evaluated their strategies: 32 percent reviewed their tracking tools, and the same number evaluated whether to expand their tracking policies. Nearly 10 percent who did not use GPS tracking were considering it. Forty-two percent took no new action.

Taylor confirmed that most corporations still take a passive approach: using TMC itinerary data, which can be problematic especially in an emergency situation when plans tend to change. More aggressive tactics are gaining traction, particularly as mobile devices play a larger role. Companies can establish a check-in procedure, for example requiring travelers to call a supervisor or a 24-hour call center twice a day. Mobile apps have streamlined this concept using one-touch check-in capability for travelers to signify they are safe. And demand has picked up for the near-real-time tracking that GPS technology provides, according to Taylor. "In the last two years it's grown significantly. [At least] 10 percent of our client base has started to use some of these tools."

## TRAVELER TRACKING SUPPLEMENTS

The changeability and potentially incomplete nature of TMC itinerary data has influenced the adoption of mobile check-in and GPS tracking strategies. Hotel attachment rates, for example, historically hover at around 50 percent to 60 percent for the industry as a whole. For firms like FTI Consulting, in which 85 percent of travel bookings are billed back to clients, there's little motivation to book through a preferred TMC, leaving vast swaths of traveler-location data unaccounted for through that channel.

### Filling the Gaps

TMCs continue to innovate tools to drive hotel attachment rates, and technology providers like Concur want to fill the channel-fragmentation

gap with solutions that capture outside bookings and offer reporting. Whether Concur can push that data back to the TMC for consolidated reporting depends. “The TMCs absolutely have to build an export from Concur’s API and would need to be certified by Concur [for that] to happen,” said senior director of global travel and marketing services Ralph Colunga. For locations where FTI doesn’t have a TMC relationship, Mosca took a pass on Concur because it can’t flow open-booking data to a travel security firm like iJET or International SOS.

Payment suppliers also can identify a traveler’s last known location through card-swipe data. “It’s not as robust or as usable to account for people or, more importantly, to act in an emergency situation to save their lives,” Taylor said. “It’s important if you have no other ways of communicating with someone.”

#### The Mobile Route

Mobile tools enable corporations to send real-time prompts for travelers to check in to confirm their locations and safety immediately. For high-risk travel, GPS tracking enables geofencing, which allows a company to receive notifications when a traveler’s device enters or leaves virtual boundaries the company has set. Travelers also receive alerts instructing them to stay put or leave the area. Such tracking also is useful in transporting VIPs, enabling travel managers to ensure the car passes certain GPS markers.

Mobile tracking strategies have their limitations, too, points out International SOS executive vice president Tim Daniel. GPS drains mobile device batteries and depend on a data connection to transmit a traveler’s location. Travelers also have to switch on the GPS and keep the device with them. All are simple issues that can significantly undermine tracking capabilities.

For these reasons, Daniel said, GPS tracking can’t replace other measures. Instead, it should be part of an overall travel security program, and that program should be in place long before a traveler sets foot on a plane. “A phone doesn’t know where you’re going next week, so we still need those itineraries.”

Philosophically, mobile traveler tracking is anything but straightforward. Travel managers must tread carefully in the area of personal privacy. As bring-your-own-



Almost  
6,000  
Number of travel  
disruptions in 2015



13%  
YOY increase

Source: iJet International

device environments proliferate, a request for employees to install tracking software on personal phones is a big ask. Even if the technology were to be installed on a company phone with the intention to protect employees, being continually tracked, especially outside office hours, feels like an infringement.

To avoid pitfalls, corporations have so far offered opt-in GPS tracking, as does iJet. “We can’t reach in and track them without them being aware of being tracked,” Taylor said. “That’s our policy. Nobody would buy [the solution] if we could turn it on anytime we wanted. We want people to use it, not be suspicious of it.”

Once travelers understand that GPS tracking protects them, however, they’re more apt to use it. Colunga said the majority of Concur employees opt in. “We can only help those who help us,” Colunga said. “If we don’t know you’re there, we don’t know what kind

of assistance you need and we don’t have a way of communicating with you [or to] provide much in way of support services. Everyone plays a part in this.”

#### BUY-IN & OWNERSHIP REMAIN CHALLENGING

Getting buy-in from corporate executives for any kind of traveler tracking can be challenging. “Telling [senior executives] we’ll get more discounts [by booking through the TMC] doesn’t matter because they don’t see it and don’t care,” said Mosca, “but duty of care is what they can see and feel.”

What further helped Mosca’s case was that two high-ranking executives were traveling in Paris during the November attacks. She tracked one through itinerary data and the other by emailing executive assistants asking if they knew of people in Paris. “Even though it was late [at night], I was able to contact them to find out if they were OK,” Mosca said. “At that point, I contacted the CEO directly and said something needed to be done.” FTI also is talking with a security and medical services supplier to serve travelers in need.

Carlson Wagonlit Travel vice president of global product marketing Carinne Saulet often sees a gap in that area. Larger clients have more resources, she said, but 90 percent of CWT’s smaller clients rely on itinerary tracking and insurance policies and have no procedure in place for travelers in need. “There’s this misperception that if they have a strong insurance they’re covered, when actually the insurance is just there to pay if they need a doctor,” Saulet said. “There is a need to have professionals take care of you, direct you to the right place, be able to act, organize and [offer] evacuation support.”

#### BEYOND BUSINESS TRAVEL

Events like the Paris attacks raise questions about whether corporations’ tracking efforts should extend to all employees, regardless of whether they travel, according to International SOS’s Daniel. “Each organization has to determine what’s appropriate for them because as you make more people part of the mission, the complexity of the tools goes up significantly.” International SOS encourages companies to make sure their traveler tracking works well and once it’s under control to expand the system to all employees. ■

CONTINUED FROM FRONT PAGE

## Corporate Travel Demand & Macroeconomics in 2016

customers rose 4 percent year over year during the fourth quarter. Removing energy and manufacturing companies from the equation, sales increased 7 percent. That growth is continuing this year, he said. "For February, transient revenue on the books is up nearly 4 percent to date. For the full year, special corporate customers tell us they expect to travel at least as much in 2016 as in 2015."

### Signs of Trouble

Some suppliers report less rosy signals. Avis Budget Group, for example, reported that 2015 commercial volume was "weaker than expected." During the fourth quarter, U.S. commercial volume dipped 2 percent year over year and total commercial volume decreased 3 percent, according to president and CFO David Wyshner. That decline came largely from the energy sector, "but the softness certainly extended beyond just oil and energy," he said.

American Express, meanwhile, called its corporate card business a "disappointment," as card-billed business dropped 3 percent year over year during the fourth quarter. It marked the fourth consecutive quarter of year-over-year volume declines, and for the full-year 2015, volume was down 2 percent.

The International Air Transport Association noted that premium air traffic growth, a key indicator of corporate travel demand, also subsided at the end of last year. While premium traffic volume rose 3.7 percent year over year in 2015, most of that occurred during the first half of the year. From July through November, premium traffic rose only 0.2 percent year over year. Relatively strong demand from robust markets, such as transatlantic routes between North America and Europe, have been offset by "slowing growth and even recession" from such emerging markets as China and Brazil, according to IATA.

"Corporate demand tends to be highly correlated with world economic performance, and the last couple of months, markets have been jittery, which is why we're seeing some shakiness in business travel," IATA director general and CEO Tony Tyler said at the association's recent Aviation Day in New York City. "Ultimately, I'm an optimist and believe that the world will work its way through these issues."

Asia also affected quarterly results for Millennium & Copthorne Hotels, which has a significant presence in that market. There, revenue per available room, a measure that combines the effects of occupancy and rate, declined 9 percent year over year during the fourth quarter. Singapore, in particular, has seen "lower corporate travel demand against a backdrop of a regional economic slowdown," according to Millennium, and the rest of Asia has seen growing supply and weakening Chinese currency.

"In 2015, global hospitality markets were impacted by falling commodity prices, mounting

### THREATS TO DEMAND

Energy sector cutbacks

Recession in China?

United Kingdom departure from the European Union?

Zika virus

Terrorist attacks

concern with regard to terrorism, health-advisory travel alerts and uncertainty regarding growth of the Chinese market," according to Millennium & Copthorne chairman Kwek Leng Beng. "These external factors ... are expected to continue in the current year."

### The Bottom Line

Those indicators do not seem to portend the bottom falling out of global corporate travel demand, at least in the short term.

Industry research indicates demand growth on the horizon, albeit at a slower pace than in previous years. UBS surveyed 75 corporate travel buyers in December and January and found that they plan to increase travel spending by 2 percent on average this year. Hotel room nights would rise 4 percent on average, according to the survey.

Even so, 57 percent will increase budgets this year and 18 percent will reduce their travel spending. A survey of budget plans, conducted at the onset of 2015, showed 73 percent of buyers planning for growth and a 3 percent average increase in total travel spend, according to UBS.

The Global Business Travel Association offered a slightly more optimistic projection, expecting U.S. business travel spend to increase 3.2 percent year over year in 2016, followed by a 3.5 percent increase in 2017. But price, not increased travel volume, will be the primary driver of those increases, according to GBTA executive director and COO Michael McCormick.

Business travel in the United States will be an "island of stability in a sea of global volatility," he said, as macroeconomic conditions in Asia/Pacific,

**"Corporate demand tends to be highly correlated with world economic performance, and the last couple of months, markets have been jittery, which is why we're seeing some shakiness in business travel."**

— IATA CEO TONY TYLER

Latin America, the Middle East and Africa drag down overall demand.

And some say the looming threats to the global economy might not be catastrophic to global travel demand. A U.K. exit from the European Union, for example, likely poses "no threat whatsoever, given the amount of traffic that goes back and forth to Britain," Airlines for America president and CEO Nicholas Calio said at Aviation Day. At the same event, IATA chief economist Brian Pearce said, "We'd have to see a real disaster" in China to stop its growth. "Despite the economic gloom, travel is growing very fast," he said.

In the bigger picture, even a recent gloomy report from Citigroup citing a higher likelihood of a global recession reveals a slight silver lining: A recession doesn't have to mean contraction; global economic growth could continue, simply falling below 2 percent. Either way, Citi's forecast ultimately has the world avoiding recession in 2016. ■

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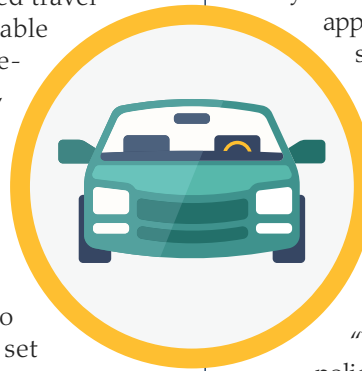
Great for **Business**

## The One-Page Travel Policy: Myth or Reality?

BY JULIE SICKEL

The travel policy: It's the framework for most any managed travel program, no matter the size. But with the rise of customizable online booking tools designed to guide travelers to preferred vendors and restrict out-of-policy transactions, how detailed does a travel policy need to be? Are the days of the 40-page policy gone and a new age of the one-page policy upon us?

"I've always felt it was possible," said Tower Travel Management CEO John Smith. "That is, as long as it wasn't all encompassing." He said the feasibility of a one-page policy depends on how expansive it needs to be. Can it just cover travel, or does the policy have to set



**"The tools that [travelers] are using to book are going to dictate the rest of the policy. The tool is already built and designed, you build those rules in there, and so you don't need to tell them every little thing."**

—ACT'S JENNIFER STEINKE

### Start with These

#### AIRFARE POLICY

Preferred supplier(s), maximum price, class of service

#### CAR RENTAL POLICY

Preferred supplier(s), maximum price, car type allowed

#### HOTEL POLICY

Preferred supplier(s), type of properties/room allowed

#### T&E BASICS

Meal guidelines, booking channel requirements, receipt requirements, program pain points

guidelines around entertainment, phone usage and other components of T&E? "If you're going to try and include all of those things, then one page is not going to get it done."

ACT senior manager of corporate travel Jennifer Steinke recently rewrote her program's travel policy, expanding it from seven pages to 28 pages to include both travel and expense guidelines. She thinks a one-page travel policy could be possible but that a better option may be to create a quick travel guide that sums up the key guidelines.

"People want really clear directions and they want to know where they can go for answers," she said. "A one-pager could get travelers by, but a more comprehensive document will hopefully ensure that you're protecting the organization as a whole."

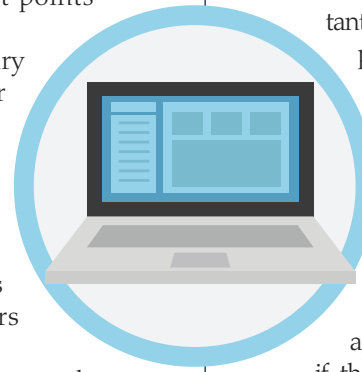
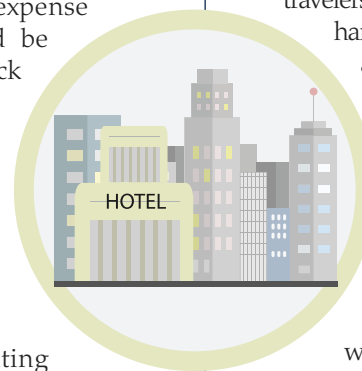
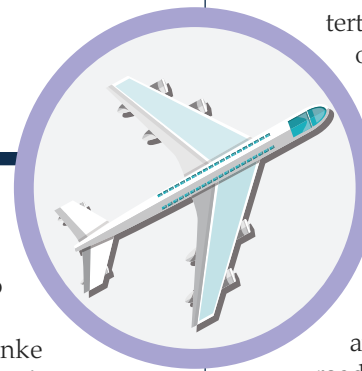
### How to Build a One-Page Policy or Summary

Whether cutting your policy to one page or instead creating a one-page summary, figure out the critically important points for your travelers.

Christopherson Business Travel offers a proprietary technology, PolicyLogic, that allows travel manager clients to build out a policy as detailed and expansive as they desire. From there, Christopherson boils down the policy to the key elements, including guidelines around air, hotel, car and supervisor permissions, said CEO Mike Cameron.

A one-page summary also may offer guidelines around meals, receipt requirements and whether travelers need to book using the approved channels.

Steinke recommends travel managers reach out to road warriors for what information they find vital and what guidelines may be unclear. "Where are the pain points?" she asked. "Those are the things you want to highlight on that one-page policy to make sure



they don't get lost in the shuffle of a bigger document."

Travel managers should avoid using vague or wordy language, Smith advised. "If your company has a 14-day advance purchase policy, there's no reason to make your explanation more wordy than a bullet point that says, 'Airfare must be purchased 14 days in advance, or supervisor approval is required.'" Smith

said travel managers who want to expand on any guidelines can do so through email newsletters or Web posts, but he recommended keeping the policy simple and straightforward. Steinke said, "You can't write a travel policy to every exception. You

have to write a policy to the majority."

Also consider culture and expectations, which vary from company to company or industry to industry. As Smith noted, some companies absolutely need to highlight entertainment policies while others don't see that as a priority.

### Benefits of a Simplified Policy

Some travelers may study every line of their firm's 20-plus-page policies, but there are likely many more, from road warriors to infrequent travelers, looking to get their hands on information quickly and easily. "The benefit is more engagement from the employees and more attention paid," Smith said.

Cameron related that the PolicyLogic summaries came about in part because clients wanted to be able to communicate the most important information about their programs to Christopherson agents quickly. "We wanted the travelers and the travel agents to be able to see at a glance: What are the high-level things that we need to know. What is it that a travel agent would need to know if they were working on one of our accounts as a backup agent and they weren't familiar with this company?" ■

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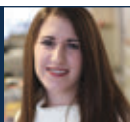
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# STR: Manhattan ADR Not Airbnb's Fault

Airbnb does not cannibalize hotel demand in New York City. At least that's one of the major findings of an analysis conducted by STR about the sharing-economy provider.

STR found that during 2015, Airbnb accounted for 5.5 percent of overall demand in Manhattan. That figure is up from 4.4 percent in 2014 but still a fairly small piece of the pie. During 2015, Manhattan hotels saw occupancy reach 87 percent, which STR said suggests large amounts of unaccommodated demand, "some of which could be accommodated by Airbnb units or by new hotel supply as it continues to open in the market." The analysis did not track the rate at which guests who search both hotel and Airbnb accommodations choose the latter.

Other conclusions STR drew from its research of the 2015 Manhattan market included: Airbnb supply accounts for one-tenth of total hotel supply; Airbnb does not undermine hotel pricing power; Airbnb units account for 3.5 percent of all lodging revenue, up from 2.8 percent in 2014; the majority of Airbnb guests stay seven or

more nights; and with only a few daily exceptions, Airbnb occupancy ran well below hotel occupancy.

"The results did not show Airbnb's growth to have a severe impact on hotel performance, as many in the industry believe," said STR president and COO Amanda Hite. "Continued analysis to understand the key performance indicators of the hotel industry and other paid accommodations will be crucial to further understand the operating environment."

Airbnb is the favored scapegoat during discussions about New York City's poor hotel

**"The results did not show Airbnb's growth to have a severe impact on [New York City] hotel performance, as many in the industry believe."**

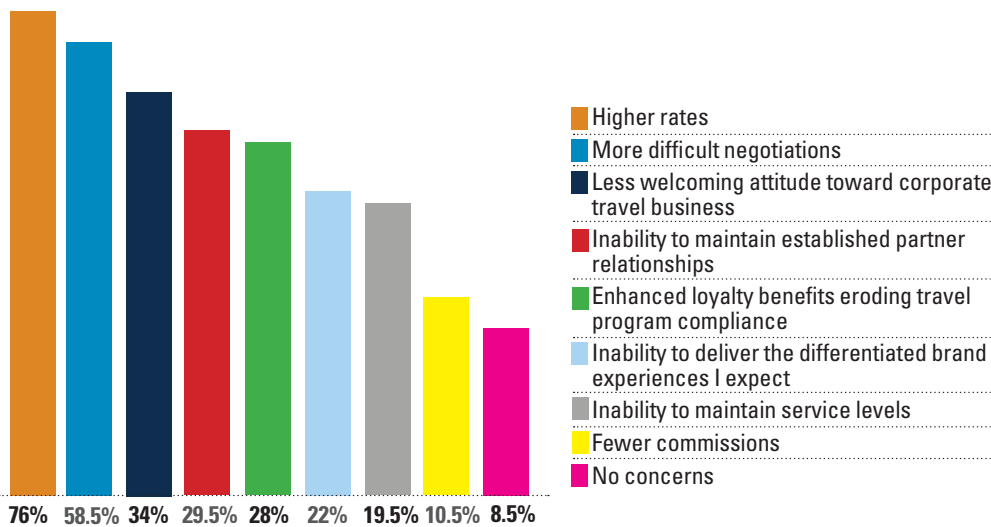
—STR PRESIDENT & COO AMANDA HITE

performance. PKF Hospitality Research senior managing director Mark Woodworth said in late October of New York City performance, "If it wasn't for Airbnb we would be seeing rate growth much stronger than what we are seeing. I can't prove that; it's only intuitive at this point, but it makes sense."

## Marriott & Starwood Have Set a Date

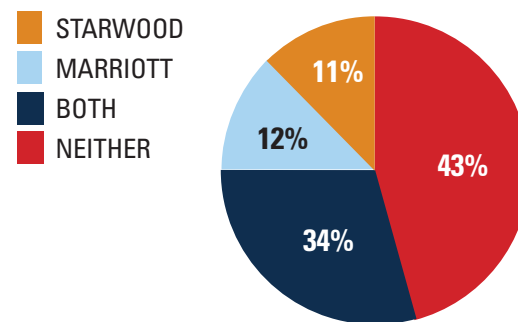
Marriott and Starwood Hotels & Resorts each will hold a special stockholders meeting on March 28 to vote on their merger. And the U.S. Department of Justice and U.S. Federal Trade Commission have given the go-ahead to the deal, which would create the largest hotel company in the world. *BTN* asked 200 travel buyers how a merger would affect their corporate travel programs. One said, "I will be able to eliminate some hotels, as I don't have to support two partners in the new model, so I may be able to leverage more." Another travel buyer worried about Marriott's ability to manage 30 hotel brands and also wondered, "Will they maintain enough business travel sales staff to continue relationships with all customers or just the big ones?"

### What concerns do you have?

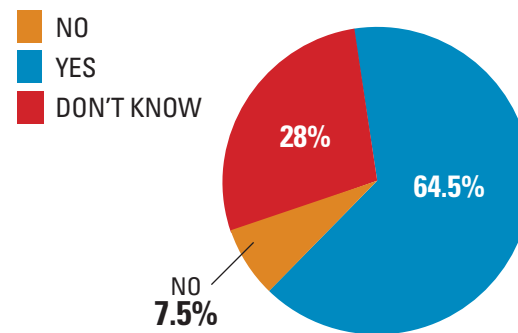


Source: *BTN* survey conducted Dec. 7, 2015, through Jan. 4, 2016

### Does your company have a preferred hotel agreement with either company?



### Do you foresee more consolidation in the hotel industry as a reaction to the merger?



While most other U.S. cities saw average daily rate increases in the mid-single digits in 2015, New York City saw ADR decrease 1.6 percent, according to STR. Conditions in the market have been so disappointing in the current cycle that STR lodging insights senior vice president Jan Freitag has suggested they're partly to blame for Wall Street's negative outlook on the current health of the hotel industry.

The STR research, however, suggests that Airbnb isn't necessarily at fault. During compression nights in 2015, in which occupancy was 95 percent or higher, hoteliers were able to realize strong rate premiums, while Airbnb achieved rate gains less than 4 percent for the same periods. "There's no way through these data sets to infer how the proliferation of Airbnb units in the Manhattan market might be influencing pricing decisions made by hotel operators of all price scales," the report stated.

Though the analysis doesn't explain what's causing poor New York City ADR performance if not Airbnb, it does mark a step toward the research company's ability to provide some analysis of Airbnb data. Multiple executives at this year's Americas Lodging Investment Summit called on STR to find a way to track Airbnb, referring to it as the "shadow supply" and asserting that it skews current hotel data.

"We requested the data from Airbnb to examine an important topic being discussed throughout the hotel industry," said STR president and COO Amanda Hite. "We wanted to compare data for both

sides to give hoteliers a true picture of Airbnb's effect on the industry because it is a dominant player in the shared-accommodations space."

To conduct the analysis, STR used internal data provided by Airbnb for the sharing-economy company's operations in Manhattan. STR compared daily

hotel data to daily data on comparable Airbnb units, those for which private rooms or entire homes were listed. For this analysis, STR examined data from the period between Dec. 1, 2013, and Nov. 30, 2015. The analysis did not examine data from the other four boroughs of New York City. ■

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# Travel Management Company Apps Hook Up With Uber

Major travel management companies Carlson Wagonlit Travel and Expedia's Egencia have incorporated Uber ride requests into their respective mobile apps. Egencia launched Uber integration as part of its ground transport enhancements for TripNavigator. CWT also has integrated the popular ride-hailing service in CWT To Go.

While BCD Travel wouldn't comment on whether it is tapping into Uber for its TripSource app, the agency confirmed that it is "actively working with Uber to bring new options to market that will improve the trip experience for travelers and let travel programs leverage shared services and their powerful data stores."

At first, corporate travel managers gave Uber a wary welcome, citing traveler safety and security concerns. Yet, the app has gained widespread adoption among business travelers and growing acceptance, if not endorsements, from corporate managers. As its reach has grown, Uber has opened itself up to integration with third-party developers, which have included quite a few players in the corporate travel realm.

TMCs are among the latest to hook in. Prashanti Tata, Egencia senior product manager for mobile, said Egencia's latest TripNavigator release added features to address the "last mile of the trip." Knowing a TripNavigator user's location and his or her next stop via itinerary data, the app shows ground travel options—driving,



Since Uber first opened its API to outside developers in August 2014, travel suppliers have flocked to incorporate it in their own native apps, including:

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**UNITED AIRLINES**

walking, public transport or Uber—and estimates the time each would take.

Users can view driving directions from Google Maps, public transit directions from Citymapper and on-demand rides from Uber. Tap the Uber option, Tata said, and "we show you further details: What is the pickup time, what is the estimated cost and what is the estimated drive time?" Request a ride and "if you have Uber app installed, it takes you to the Uber app with all your pickup and destination information pre-filled, as well as the type of Uber you've selected," she said.

Egencia also is working to report on traveler ground behaviors for travel managers, including such data as Uber click-throughs.

Similarly, CWT's Uber connection taps into geocodes and traveler trip information to be "contextual to the itinerary," according to CWT vice president of emerging products and innovation Patrice Simon. CWT executive vice president of global marketing and enterprise strategy David Moran added that CWT To Go "knows you have arrived at your destination and prompts Uber to pop up." If clicked, the traveler's user and destination information is pre-populated to request a ride via Uber.

Within nine months of opening up to developers, Uber "skyrocketed to the No. 1 spot in the ProgrammableWeb top 10 travel APIs list," according to an April 2015 report from the popular information site for developers.

There are several ways third parties can hook in Uber, from a Ride Request Button to deep linking, which launches the Uber app on a user's phone. An affiliate program even pays third parties \$5 for each new rider they send to Uber via their Ride Request Buttons, deep links or application programming interface integration, according to Uber's developer site. ■

## New Amadeus Tool Means No More E-Travel Updates

The widely-used e-Travel Management is no longer Amadeus' premier booking tool. The company has launched Amadeus cytric Travel & Expense and no longer will update e-Travel.

It did not announce plans to sunset e-Travel, which has 11,000 corporate customers in more than 100 countries. However, Florian Tinnus, head of corporate IT for the global customer group, told *BTN* Amadeus will focus all booking and expense product development efforts on the new tool.

The system, which Amadeus intends to have customer ready by the second quarter, builds e-Travel features and services onto Cytric, a global distribution system-agnostic platform that Amadeus acquired when it bought i:FAO over a year ago. The new system also will incorporate the Outlook booking integration on which Amadeus has been working with Microsoft.

Tinnus said Amadeus cytric Travel & Expense will retain the modular approach to expense that allowed e-Travel to be used with expense tools like Chrome River, Expensify and Concur,

**"Concur has been very strong in expense management solutions for corporates. Now, we are present as part of our acquisition of i:FAO, so it proves there is good opportunity of providing additional solutions."**

**— AMADEUS PRESIDENT & CEO LUIS MAROTO**

but the new system also integrates booking and expense. "This tool is aimed at creating a traveler experience ecosystem," he said.

During Amadeus's fourth-quarter earnings call, president and CEO Luis Maroto suggested Amadeus cytric Travel & Expense will ramp up competition between his firm and Concur.

"Concur has been very strong in expense management solutions for corporates," said Maroto. "This is an area where we were not present in the past. Now, we are present as part of our acquisition of i:FAO, so it proves there is a good opportunity of providing additional solutions."

*—David Meyer & Jay Boehmer*

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# 2016 Hotel Contract Negotiations: Tougher Dealings, Softer Rates

BY JULIE SICKEL

The negotiating season for 2016 corporate hotel rates proved to be even more challenging than in previous years, but efforts paid off, as rate increases came in softer than forecast in most global regions, according to analysts at mega travel management companies' consultancy groups.

"We did run into situations where we really had to do multiple rounds of negotiations," said Marwan Batrouni, senior director and global hotel practice area leader at BCD's Advito consultancy, "similar to last year, but it felt like it was a little bit more demanding than last year, especially in primary markets."

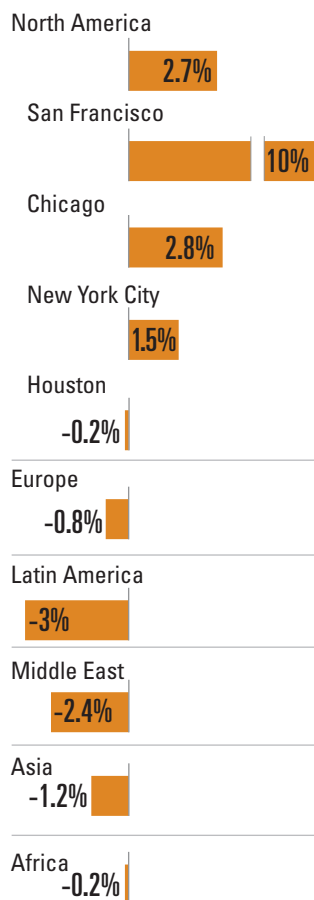
Eric Jongeling, director of hotel solutions in the Americas for Carlson Wagonlit Travel, said many clients had a hard time getting hotels to even respond to requests for proposals, as the suppliers expected larger room night or spend commitments. That back-and-forth of trying to get hotels to bid added time to the negotiation season, Jongeling said.

In North America, hotel rate increases averaged 2.7 percent year over year, according to Batrouni. "Not too bad," he said, "given that we were forecasting a little over 5 percent increase for the entire year." Not surprisingly, San Francisco proved the anomaly, as rates increased more than 10 percent year over year. In New York City, negotiated hotel rates increased an average of 1.5 percent, while in Houston, rates dropped 0.2 percent. Chicago's average increase of 2.8 percent was on par with the region.

Europe saw a 0.8 percent increase in rates. That average, the result of large increases in some markets and significant decreases in others, is less than the 3 percent originally forecast by Advito. Rates decreased in all other regions: 3 percent in Latin America, 2.4 percent in the Middle East, 1.2 percent in Asia and 0.2 percent in Africa.

"Every region has a slightly different dynamic in terms of supply and demand, so that definitely plays a part in what we

## Advito Clients' Negotiated Hotel Rate Changes from 2015



**"We did run into situations where we really had to do multiple rounds of negotiations, similar to last year, but it felt like it was a little bit more demanding than last year, especially in primary markets."**

—ADVITO'S MARWAN BATROUNI

are seeing here," Batrouni said of the softer results, "but we feel that negotiations are also playing a fairly big role. We compare the initial bids that come in, which would be indicative of how suppliers feel about the situation in their specific markets, with where we end up at the end of the RFP season. In all cases, the initial offer is higher than where we actually end up."

According to Jongeling, CWT clients saw North American rates increase by a little over 4 percent, the bulk of that coming from U.S. markets, up 4.2 percent. In Europe, rates grew about 1.5 percent. Asia/Pacific saw a 2 percent increase, and

Latin America saw a decline of 0.5 percent.

Chicago-based Exp corporate services and travel manager Christel Peterson, who negotiates with about 25 regular hotels, said her program fared better than expected. "I was surprised at some properties that didn't put in too much of an increase." Others though, tried to increase rates by as much as 20 percent on their initial offer, finally lowering their figure after some back-and-forth.

Dynamic pricing factored into discussions once more for 2016, but Batrouni said hoteliers' push for it was weaker than he anticipated, indicating "there's still that appetite by suppliers and corporate buyers to continue on with static rates." Chainwide agreements were more top of mind this year than in previous years, he said. Some clients accepted that dynamic rates may be a better option for supplementing their programs in secondary and tertiary markets, something he expects will continue.

Jongeling said clients have chosen to accept dynamic rates in certain instances, "but a lot of them are still not completely comfortable with the dynamic approach. They don't feel like they have enough visibility into what they're actually receiving through that negotiation."

Hotel amenities, such as breakfast and free Wi-Fi, have played an important role in negotiations in recent years, as hoteliers leverage them to push rates. For 2016, however, those amenities carried less value as they became increasingly standard, according to American Express Global Business Travel hotel practice line manager Cindy Armitage. Jongeling, too, saw "flat, if not better amenities inclusion than in previous years."

Batrouni suggested hoteliers have instead set their sites on cancellation terms, withholding same-day-cancellation agreements where they might have once withheld free Internet. "There was a lot of negotiation and back-and-forth to make sure that we have same-day cancellation for our clients," Batrouni said, adding that he expects cancellation terms will be a bigger issue in upcoming RFP seasons as hoteliers experiment with stricter policies. ■

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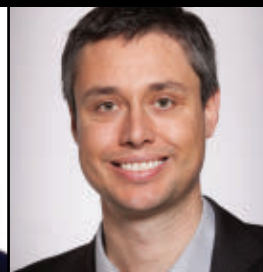
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# ESA Is Overhauling More Than Just Its Hotels

BY JULIE SICKEL

Extended Stay America wrapped up 2015 and its fourth quarter with strong growth in both revenue and average daily rate and entered 2016 with renovations complete at 463 hotels, 75 percent of its portfolio. But more than remaking its property portfolio, the company last year revamped both its sales strategy and its revenue management system under a new CEO.

“We have more people in our sales team now than I think we’ve ever had in our history,” said CEO Gerardo Lopez, who joined the company in August. The company hired 16 additional salespeople during the third quarter and centralized its sales team. “We have a structure that I find, as a new guy still, frankly very astute,” he told *BTN*.

Lopez said that move has helped ESA be more responsive and grow its corporate accounts, which make up 40 percent of its overall business. That corporate business, too, is shifting, due in large part to the renovations already completed. “When you renovate hotels, generally that allows us to think about getting a different type of business that might not have considered us before,” Lopez said. “We see a lot of strength in industries like IT, medical, industrial, education.”

Last year, ESA also made efforts to attract higher-paying, shorter-stay guests, which led the company to sacrifice some occupancy as it figured out how to achieve that mix, CFO Jonathan Halkyard said.

“What we’ve done is, through the work of the sales group, put more focus on what is really our sweet spot,” Lopez told *BTN*, “and really our sweet spot is a week to a month.” That segment, he added, makes up 27 percent of ESA’s current business.

ESA, unlike much of the U.S. hotel industry, doesn’t operate

on a franchise model; instead, the company owns and operates every property. It’s a way of doing business that Lopez said has allowed the company to be nimbler and fully aligned across the portfolio, particularly during a renovation project that has spanned three years. But with renovations wrap-

## Extended Stay America’s Q4 YOY Performance

	Renovated	Nonrenovated
ADR	↑ 5.5%	↑ 3.2%
RevPAR	↑ 8.5%	↑ 5.3%
Occupancy	↑ 200 basis points	↑ 140 basis points

ping up and Lopez at its helm, the company has a chance to figure out in which direction it wants to head.

“[The owning-operating model] is the way that the company has been built, it has been a conscious decision,” Lopez told *BTN*. Now, though, the company is considering whether to explore franchising or financing in order to expand unit growth. “Headroom exists, should we choose to tap into it. Then it’s how quickly, how fast, where and how? For us, after the better part of eight years, nine years without putting up a new hotel, as we gear up to start doing it again, all options are on the table.” ■

# New Spirit CEO’s Operational Plans Could Draw in Business Travelers

BY MICHAEL B. BAKER

Newly appointed Spirit Airlines CEO Robert Fornaro is turning his eye to operational improvements and expects the ultra-low-cost carrier might begin to pick up business travelers in the process.

Fornaro, the former AirTran president and CEO who took over for departing CEO Ben Baldanza at the beginning of this year, said during the carrier’s earnings call he does not see a need for “sweeping changes [but] improving the overall customer experience” will be the top priority for 2016. “This includes improving our on-time performance and maintaining a high completion factor, as well as improving our customer service metrics,” Fornaro said. Some of those changes include “slightly reducing utilization in peak periods, increasing our spare aircraft and increasing

crew management staffing levels.”

Cowen and Co. said such improvements have become vital to Spirit as the larger carriers introduce stripped down, competitive fares. “In an environment where network carriers are matching Spirit fares with better products, the company needs to be as reliable as possible or risk potential book away,” Cowen’s research note said.

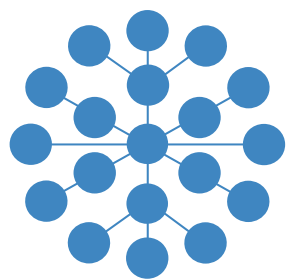
During the earnings call, one analyst

compared Spirit to Ryanair, which has softened its image as a no-frills, passenger-unfriendly airline over the past few years and has begun targeting corporate travel. Fornaro said the comparison is apt. “With an improvement in reputation, you’ll see a lot of business flyers or corporate flyers who pay their own ticket ... not necessarily large global companies where you have to compete with corporate contracts, but there is a high percentage of the business market where customers pay their own ticket.” ■

**“You’ll see a lot of business flyers or corporate flyers who pay their own ticket ... not necessarily large global companies where you have to compete with corporate contracts.”**

—SPIRIT AIRLINES CEO ROBERT FORNARO

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# Three Companies Making Plays for Europe

An expansion to Europe means more than capturing local business. For these three companies, it's about global-scale service.

## Expensify Opens First European Office

Expensify has opened a five-person office in London to build its U.K. user base and plans to add more staff this year. A European expansion was "inevitable," according to Expensify CEO and founder David Barrett. The company already was serving 1,000 clients in the United Kingdom, both local organizations and U.S. companies with offices there. "We had roots there for a while, working out of coworking spaces in Germany and the U.K., but now we're formalizing things and ramping up overall," he said.

Before establishing the U.K. office, Expensify, which processes expenses in real time rather than waiting for employees to submit for reimbursement, wanted to ensure it was technologically equipped to process Europe-specific line items like taxes and currencies on a greater scale, Barrett said. The software supports 160 currencies. "There were a lot of small details, so we made sure we understood the needs of the market and not try to oversell ourselves," Barrett said. "The easiest thing to point to is tax support. The European tax system is much more complicated than in the U.S."

—JoAnn DeLuna

## Chrome River Is Ramping Up in the U.K., Too

For expense management company Chrome River, 85 percent of its clients are headquartered in the United States. However, the company—developed to serve growing organizations, including those expanding to new countries—handles reimbursements that go into banks in 90 countries. And now, chief marketing officer Julie Roy told *BTN*, the company is ready to solidify the presence it's had in the United Kingdom for a few years. "It's the satellite for all of Europe, but we're focusing primarily on the U.K."

She cited a need for expense and invoice management in the United Kingdom, as well as interest from potential clients, noting similar opportunity in France. She said expansion will occur both via partnerships and direct to customers.

Roy said Chrome River does not compete directly with Expensify in the United States, claiming that company serves companies of 100 employees or less, and thus she does not expect friction in Europe, either. Concur, though, is another matter. There are not a lot



**CHROME RIVER** also plans to open a data center in Europe, chief marketing officer Julie Roy told *BTN*, without sharing a timeframe. The company declined to discuss drivers, but as the market dissects the United States and European Union's Privacy Shield agreement, a data center on European soil skirts the issue entirely. Said Roy, "We already are adhering to data rules of each individual country."

of players in the upper-mid to large enterprise global market sector, Roy said, but Concur has traction in the enterprise market. Great Hill Partners invested \$100 million in Chrome River last year, she said, because it saw the potential to grab some of Concur's market share in the enterprise sector. And she claimed clients are switching from Concur and the recently defunct IBM Global Expense Reporting System thanks in part to drawn-out implementation times for new Concur clients. "We have a decent win rate over Concur. We don't win every deal, but it's a fair fight."

Chrome River also has hired a salesperson based in San Francisco to develop West Coast and Asia/Pacific business.

—JoAnn DeLuna

## Concur Launches TripLink in France & Germany

Expanding on TripLink's availability in Australia, Canada, the United Kingdom and the United States, Concur launched the offering in France and Germany. TripLink lets corporate users capture off-channel bookings through traveler-itinerary sharing or directly through integrations with participating suppliers. The latter allows corporate travelers to book on supplier websites to access corporate-negotiated content.

TripLink integrates with such travel suppliers and intermediaries as Airbnb, Avis, InterContinental Hotels Group, HotelTonight, Omni Hotels and Starwood Hotels & Resorts. The program also has secured commitments from Accor-Hotels, Air Canada, Booking.com, Captain Train, Enterprise, Etihad Airways, Lufthansa, National Car Rental, Marriott International, Sixt, United Airlines and WallyPark.

—Jay Boehmer

# Premium Air Traffic Grew Slowly Late in 2015

BY MICHAEL B. BAKER

Global premium air traffic volume rose 1.7 percent year over year in December, marking slow corporate demand growth at the end of 2015, the International Air Transport Association reported. For the full-year 2015, premium traffic volume rose 3.7 percent, but much of that growth occurred at the beginning of the year. Uneven global economic growth, slow world trade growth and tougher times in sectors that use premium cabins—such as banking, mining and energy—are unlikely to change in the short term, so premium-traffic growth will be modest in the coming months, IATA reported.

Growth of premium traffic on North Atlantic routes was above the global average, up 2.4 percent year over

year in December and 4.5 percent for the full year, "supported by solid economic growth in the U.S. and a modest cyclical upturn in Europe," according to IATA. Growth was sluggish or down in 2015 on Asia routes except transpacific ones. December premium traffic between Europe and Asia was down 2.6 percent.

Even as growth of premium traffic lags growth of economy class traffic, though, premium fares are not declining, IATA reported.

## Accidents & Fatalities

The global airline industry had one major accident per every 3.1 million flights in 2015, according to

IATA, a slightly higher rate than 2014 but well below the average of the previous five years.

Among commercial flights, fatalities dropped significantly in 2015: Four turbo-prop accidents resulted in 136 fatalities. From 2010 to 2014, the global commercial aviation industry averaged 17.6 fatal accidents and 504 fatalities per year.

IATA's statistics included neither the Germanwings Flight 9525 crash in the French Alps, caused by a suicidal copilot, nor Russia's Metrojet Flight 9268, which disintegrated over Egypt owing to suspected terrorist activities because they were "deliberate acts of unlawful interference." ■

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## What the Traveler Thinks: Track Me, It's OK

BY ELIZABETH WEST

Who's responsible for business traveler well-being, and what tactics should companies use to monitor employees while they're traveling for business? *BTN* surveyed 210 managed business travelers who took at least four trips, each one including a flight and at least one hotel night, in the past 12 months.

**47%** believe their company is entirely responsible for their well-being while on a business trip.

That means providing travelers with safe transportation, lodging and access to support. It also means understanding where they are and being able to communicate with and assist them in a crisis. Forty-five percent of male travelers and 47 percent of female travelers pegged their employers with complete responsibility for their well-being while on a business trip. Thirty-three percent of males and 41 percent of females relied on their companies to be very responsible, and 18 percent of males and 10 percent of females felt they shared equal responsibility with employers. Below that level, percentages for both groups were small.

Slicing the data by travel frequency brought starker differences to the surface. Travelers hitting the road 12 or more times a year levied much more responsibility on their companies. More than 64 percent of frequent travelers said their company was entirely responsible for their well-being, and 29 percent said the company was "very responsible."

**94%** would opt in for GPS tracking of their mobile device if traveling to a high-risk market.

Defining a high-risk market has become increasingly difficult, but where travelers perceive an increased risk, the vast majority would sign up for GPS tracking of their whereabouts. The result is curious, given the fact that 20 percent of respondents cited GPS tracking as

**Half of business travelers feel less safe on business trips than they did one year ago.**

"not appropriate" in general, even in high-risk markets. GPS tracking may seem invasive in concept, but the option becomes more attractive put into the context of a specific trip.

Given their declared reliance on their companies for their well-being, frequent travelers were the least squeamish about all suggested traveler-tracking strategies. Two-thirds said GPS tracking was fine for "all trips," compared with just 45 percent of total respondents. Two-thirds of all respondents were comfortable with employers mining itinerary data for all trips; compare that with more than three-quarters of frequent travelers who assume their employer should be scanning itinerary data for all trips.

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Nearly all respondents were comfortable with drilling into itineraries for high-risk trips.

Overall numbers were similar for monitoring credit card data for the last place the traveler charged an expense; 69 percent were open to those queries. Frequent travelers fell in line with the group on this count.

**49%** of travelers feel less safe on business trips than they did 12 months ago.

Terror attacks, social unrest, refugee crises and downed flights filled headlines over the past 12 months. While business travel industry associations reported little market effect on trip volume, *BTN's* survey showed a psychic toll on business travelers. All groups reported similar heightened concern, but female business travelers changed the most; 54 percent feel less secure now, compared with 46 percent of males and 47 percent of frequent travelers (among the survey's sample of frequent travelers, nearly two-thirds were male). ■



### LISTEN TO THE TRAVELER

Travel programs are re-orienting around the traveler. As mature programs squeeze out the last drops of procurement savings, driving program compliance, loyalty and traveler behavior will emerge as the best vector for savings. Is your program providing what travelers need? In this new quarterly feature, *BTN* gathers the opinions of business travelers to help you gauge aspects of your travel program. You can take our word for it, but also ask your own travelers:

- Have terror attacks, social upheaval and other high-profile events affected your sense of safety while traveling on business?
- To what extent do you consider the company responsible for your well-being while you travel on its behalf?
- When do you think it is appropriate to use the following strategies to track your whereabouts while you are traveling on business: TMC itinerary data, corporate card-swipe data and GPS tracking?
- Would you opt-in for GPS tracking while you are traveling?

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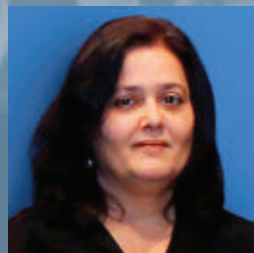
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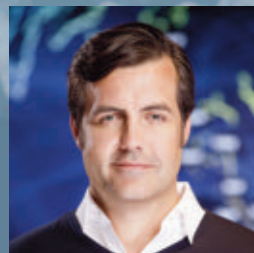
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