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THE COMPETITION TO BE BTN'S INNOVATOR OF THE YEAR

At The BTN Group's recent Innovate Conference, SpotHero reeled in the 2017 Innovator of the Year award, as named by our judges, and DVI took home the People's Choice award, as voted by attendees. Read about their products and those of the other competitors, plus judges' concerns and compliments.



SPOTHERO'S **BECCA RABINOWITZ**



DVI'S **BRIAN BEARD**

PAGE 12

TOP STORY

HOW CORPORATE TRAVEL BUYERS RATE U.S. AIRLINES

Average of each airlines's scores—on a scale of 1 (poor) to 5 (excellent)—across 10 categories



BTN'S 2017 AIRLINE SURVEY

Delta Sets Record for Wins

For a record seven times in a row, travel buyers gave Delta Air Lines the highest satisfaction rating in BTN's annual survey. Delta scored a healthy premium above its competitors in all categories, earning its highest marks for communication with buyers, customer service for travelers, and its sales team. American Airlines and United Airlines, meanwhile, both improved their overall score compared with 2016 and maintained their respective second- and third-place rankings. Southwest Airlines' score declined year over year, though it continued to shine in the value and customer service categories. U.S. carriers have sailed on several years of profitability, and all carriers in BTN's report say they are investing some of that back into building their sales teams and adding tools and features for corporate buyers.

FULL STORY ON PAGE 8

GDSs, Surcharges, TMCs, NDC, APIs: What the Heck Is Going On in Europe?

EDITED BY AMANDA METCALF

To start: a primer on the interplay among global distribution systems, airlines and travel management companies. TMCs, on which many corporate travel programs rely, use GDS infrastructure to shop for and book airline tickets. The GDSs, in turn, offer financial incentives to travel agencies for booking through their channels. The GDS operators also charge airlines for each transaction the GDSs facilitate.

The GDSs want access to airlines' full collection of content, and they want the prices listed to be the same as those offered for display on other distribution channels, a concept known as fare parity. Further, GDSs seek assurances from airlines that airlines will not

surcharge GDS bookings or otherwise discriminate against that GDS's users. So, when an airline participates in a "full content" agreement, a GDS in exchange will discount the transaction fees it charges the airline.

One by one, though, Europe's three biggest airline groups have veered from this long-running structure for legacy airlines. Each of the three has implemented a surcharge on bookings made through the GDS and opted out of their full content agreements. That surcharge is to be paid by travelers, or ultimately their companies, when booking tickets through travel agencies that access content from

CONTINUED ON PAGE 18

What's Inside

3 ON THE HORIZON

- Southwest is redeveloping its corporate booking portal
- Lufthansa will work with blockchain distribution company Winding Tree

16 TRANSPORTATION

- Alitalia is now judging the suitors that propose to lead it out of bankruptcy

22 PAYMENT & EXPENSE

- Two initiatives to ease virtual card payments at hotels

24 MEETINGS

- Crowne Plaza makes flexible meeting spaces part of brand standard

26 GLOBAL

- Travel companies face more uncertainty over data transfers from the EU
- Travel industry weighs its own GDPR-code of conduct

28 TECHNOLOGY

- How the new Traxo filter captures off-channel bookings
- Bob Brindley moves to startup TripActions

30 PROCUREMENT

- Chrome River pilots travel ROI tool

40 APP ANALYSIS

- Comparing three apps for simple meetings

4 | On the Record



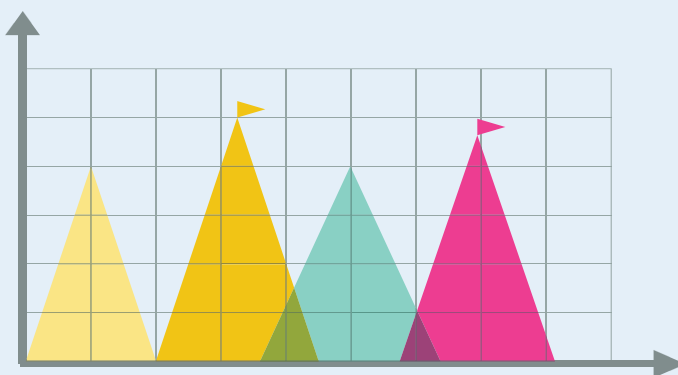
Carlson Wagonlit Travel chief data scientist Eric Tyree on the travel management company's role in an evolving corporate travel industry

"We can now start solving problems that travel managers haven't really been able to approach before. For example, what is the ROI on travel, and how do I use that to defend my travel budgets?"

6 | Data Hub

Hotel Industry Records in 2017

Both the fees & surcharges U.S. hotels collect & their capital expenditures are expected to hit records in 2017.





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Southwest Is Redeveloping Its Corporate Booking Portal

BY JAY BOEHMER

Southwest Airlines plans to relaunch its Swabiz corporate booking portal late next year, now that the airline has completed a years-long effort to swap out its core passenger services system, chief revenue officer Andrew Watterson said during the recent ARC TravelConnect conference in Washington D.C.

Asked by an event participant when Southwest would make Swabiz “less time consuming so it is easy for us to use and book,” Watterson acknowledged the current system could use some work. He said the questioner’s use of the phrase “time consuming” was charitable. “When we were changing our res system, that was almost all consuming. It took a lot of money but also management time, so we did not invest in Swabiz as we should have. So, currently we’re redeveloping Swabiz.” Watterson declined to dig into specifics on the refresh, “but as we get to late next year, hopefully you’ll find a new and improved tool.”

Southwest is well known for its direct-first distribution approach. In 2016, nearly 80 percent of its passenger revenue came in through its website and Swabiz booking portal, according to the airline’s annual report. Yet, Southwest participates in other distribution channels, too: It deals in the Sabre and Travelport global distribution systems on a limited basis and has a direct connection to booking systems like Concur, Deem, Egencia, GetThere and Amadeus.

“We sell predominantly through our website,” said Watterson. “We have a substantial amount of business we sell through direct connect. We have a substantial amount of business we sell through Swabiz. And we also sell through the GDSs still for a nontrivial amount of business. We have a diver-



sified portfolio of distribution channels. We just chose to over-index the one that works best for us. If business trends take us differently, we will modify to the environment we find ourselves in.”

Watterson suggested Southwest has no plans to expand distribution into online travel agency channels. A competitor, JetBlue, inhibited ticketing authority for a dozen OTAs in October.

Not a Midlife Crisis

Separately, at The Beat Live conference, Southwest distribution marketing adviser Richard Sweet said the airline would resist changing its identity in light of new capabilities it has gained through its new reservations system, powered by Amadeus. Sweet said: “We’re happy with it and ... we basically get capacity, we get flexibility. But it doesn’t change how we go to market. It doesn’t change what we fundamentally are and have been for 46 years, and that’s been a very, very, very successful model. A lot of people anticipated that we’re going to change a reservations system and then we’re going to morph into something that’s more like our competitors. That’s not the case. The case is that we needed it. We needed a more robust platform for us to work from.”

On that note, the Amadeus Altea system gives Southwest significant capability for ancillary sales. At the ARC conference, one attendee asked how long Southwest would “leave millions” on the table by not charging for checked bags and cashing in on other ancillary opportunities. It’s a question the airline gets a lot, and Watterson got applause for his response: “It is terribly inhospitable to be charging for bags and charging change fees,” he said. “It does not cost us 25 bucks to handle your bags. It does not cost us 200 bucks to change your reservation. It’s just a ruse by other airlines to avoid taxes.”

“A lot of people anticipated that we’re going to change a reservations system and then we’re going to morph into something that’s more like our competitors. That’s not the case.”

—SOUTHWEST’S RICHARD SWEET

Lufthansa Will Work with a Blockchain Travel Distribution Company

BY MICHAEL B. BAKER

Blockchain-based distribution platform Winding Tree will receive technological information from Lufthansa Group that will make it easier for Winding Tree to work with long-haul carriers. Additionally, the technology company, which is using blockchain to create “decentralized travel distribution,” will launch a token sale to establish its cryptocurrency, Lif, in February. Lufthansa will participate in the presale to show it’s

“It’s the first case where a travel company is buying into a decentralized project, and not as an investor.”

—WINDING TREE’S PEDRO ANDERSON

“committed to using the platform,” Winding Tree COO Pedro Anderson said.

“We see this as a historical moment for travel, more specifically for travel distribution, because it’s the first case where a travel company is buying into a decentralized project, and not as an investor,” he said. “Everything is open source, and they’re committed to getting their hands dirty.”

Lufthansa SVP of distribution and revenue management Markus Binkert said, “By integrating these APIs with Winding Tree’s public blockchain, Lufthansa Group enables all innovative partners who develop cutting-edge travel applications to access these offers via a decentralized and [intermediary]-free travel marketplace.”

Next, Winding Tree plans to launch distribution and smart contract products for hotels, followed by similar products for airlines.

CWT's Data-Centric Strategy

This year, as part of its “CWT 3.0” technology initiative, Carlson Wagonlit Travel brought onboard as chief data scientist Eric Tyree, who previously held the same role at U.K. professional services company Capita. He spoke to BTN senior editor Michael B. Baker about CWT's plans.

WHAT SORT OF SOLUTIONS ARE YOUR FOCUS RIGHT NOW?

We started by looking at the travel manager: What's available to the travel manager now? What data is out there that's not getting used by travel managers that can solve problems that either are very laborious or aren't getting solved by them? We're also in the process of getting an Amazon-like experience using personalization, modern automation tools. The end game is: “I'm going to New York next week and going between [certain dates].” I should be able to do that in one click. My air and ground transportation should be understood; my hotel preferences should be understood. They should just pop up as my itineraries, and they should be the best one in terms of my corporate travel policy and my preferences.

HAVING COME FROM OUTSIDE THE TRAVEL INDUSTRY, WHAT WAS YOUR FIRST IMPRESSION IN HOW TRAVEL DATA BY AND LARGE IS BEING MANAGED?

It was shock and horror. I would have expected that it would be foundational for travel expense and credit card data to be integrated by travel managers because if you don't have those integrated, anything off channel you can't see. You don't have any granularity or control over it. The first thing we did when I joined CWT was go right for that.

WHAT IS THE TMC'S ROLE?

We can now start solving problems that travel managers haven't really been able to approach before. For example, what is the ROI on travel, and how do I use that to defend travel budgets? Everyone talks about it, and they might deal with it at the level of “I want to spend some money on software” and make a case. Very few have gotten to the point of saying, “What's the relationship between travel and revenue growth?” and showing that correlation.

So, if the CFO comes along and wants to reduce travel expenditures, they go after the bits where it's sensible. If you go to a CFO and say, “I can prove to you if you cut in this division here or that customer there, you will lose revenue,” then they're not going to touch it. It's really about getting better data-driven tools to make the case of doing the right thing or to automate stuff and take out a lot of the busy work. There's a lot of manual work going on, and these are big global clients. You ask the travel manager, “What are you doing with these reports?” They say, “I'm looking for this.” You say, “How do you find this? Show me.” They're going through hundreds of lines of reports. You should be getting a set of alerts saying you have an anomaly and you need to investigate it. They shouldn't have



Carlson Wagonlit Travel chief data scientist Eric Tyree talks:

- Tackling travel ROI
- A Google-esque search tool for travel management data
- Bracing for GDPR compliance

“A lot of the data revolution that we're doing is not about getting better data and getting it integrated in front of travel managers and travelers but putting the tools on top of it so it integrates into the processes better. That's where a TMC can operate much more efficiently.”

to spend five minutes trying to find the anomaly in the first place.

A lot of the data revolution that we're doing is not about getting better data and getting it integrated in front of travel managers and travelers but putting the tools on top of it so it integrates into the processes better. That's where a TMC can operate much more efficiently. We understand the data, but we also understand the business. When we build solutions or analytics or parts, we can make sure they're done in a way that's compatible with travel policy or we can advise on what travel policy should be. When you get an industry that's new to analytics, there's a tendency to reach for traditional data integrators. The problem with that is they don't understand the industry, so you get good analytical reporting solutions but they're useless.

IN TERMS OF ACTUAL PRODUCTS, WHAT ARE YOU DEVELOPING?

We have a product called AnalytIQs that began as a reporting system but has become a command-and-control system because that's what clients need. You take safety and security. It's one thing to know where your travelers are, but then what? You have to be able to contact them, so you need communication tools within it. You need to be able to work with third-party providers who help ensure the security of your travelers.

We also have a product that's doing the whole data integration piece. We have a bunch of stuff coming out next year. We looked hard at what travel managers need in terms of reporting and getting the information they need. [But] they can't even tell you in advance [entirely] what they need. We've developed a Google-like experience with it. If a client needs a report ... we can say, “Fine, we'll add it to the product; wait six months.” But wouldn't it be better if you could attach a Google-like search to data directly ... and rather than getting Google links back, I get a graph? That enables us to cover a lot of this long, long tail of operation needs that come up on a random basis. We can do this in ways that are much more efficient and cheaper than ever before. You don't need a techie to do it. A travel manager can learn this system in 20 minutes. It's basically learning to do an advanced Google search. We've tried it out. We've given it to program managers who are very low skilled technically.

HOW ARE YOU CONTENDING WITH UPCOMING CHANGES IN PRIVACY REGULATIONS?

It absolutely defines the landscape we operate in. The [General Data Protection Regulation] rules in the EU—the maximum fine is 4 percent of your global revenues. That gets your attention. Our global clients are saying, “Are you GDPR compliant?” so it will effectively become the global standard. We are very sensitive about it not only for that regulatory reason but also because whatever we do has to be right for the client and the traveler. That defines how we operate. You cannot ignore that. I've got dedicated legal staff in the company who just sit and advise on privacy issues not from a regulatory point of view but from a contractual point of view. I don't think you can be in the data business and not. It's kind of like your right hand. It defines how you work. ■

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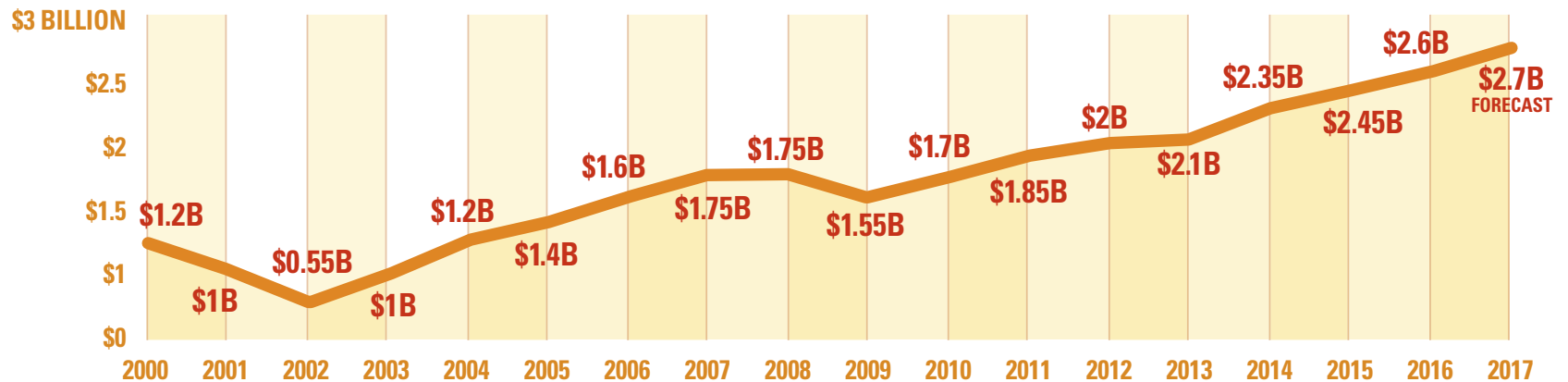


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Fees & Surcharges Collected by U.S. Hotels in 2017

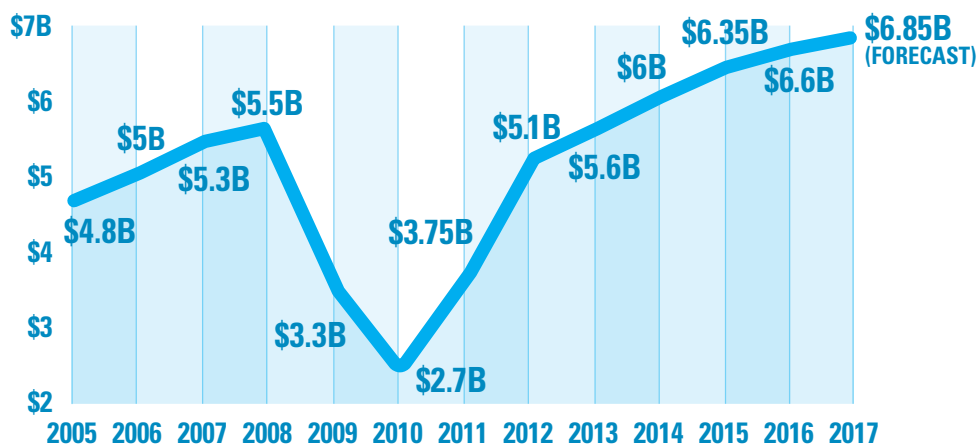


In 2017, U.S. hotels will collect 5 percent more in fees and surcharges than they did the year prior, according to Bjorn Hanson, a clinical professor at the New York University School of Professional Studies Jonathan M. Tisch Center for Hospitality and Tourism. However, the industry is reducing fees and surcharges for high-speed Internet access. U.S. hotels broke the record last year, collecting \$2.6 billion in fees and surcharges, a greater amount than was first forecast. The largest increase was in cancellation fees. Earlier this year, Marriott International and Hilton instituted penalties for cancellations made less than 48 or 72 hours in advance. InterContinental Hotels Group, too, tightened its cancellation policy, though to the 24 hours Marriott and Hilton previously had required.

REASONS BEHIND THE 2017 RECORD

- More fees collected for cancellations
- About 2 percent more hotel rooms occupied than in 2016
- New categories of fees & surcharges

U.S. Hotel Capital Expenditures Also Will Hit a Record This Year

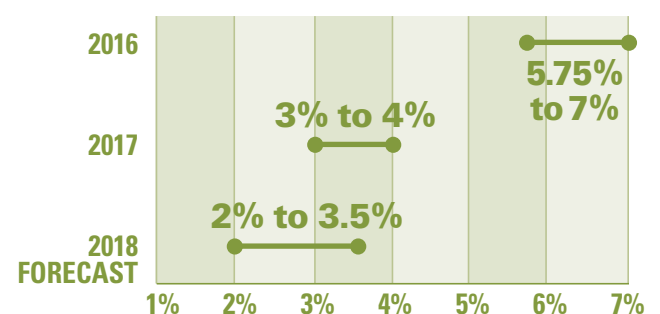


The U.S. lodging industry's spending on capital expenditures this year is expected to reach a record \$6.85 billion, a 3.8 percent year-over-year increase, according to Hanson. With revenue per available room projected to grow between 2 percent and 2.5 percent, he said capex "could increase between 60 and 70 percent more than the percent increase in RevPAR." Enhancements to hotel properties, such as converting a tub/shower unit to a walk-in shower or updating the bedding, typically fall under capex. Hanson said many of the improvements, listed at right, are expected of hotel owners and franchisees to keep up with brand standards set by hotel companies. He said guests' social media posts about property design, amenities and quality form a somewhat new but persistent influence on capex.

CAPEX PRIORITIES FOR 2017

- Improved revenue management & property management systems
- Increased Internet speed & bandwidth
- Redesigned lobbies
- New restaurant & food & beverage concepts
- Updated in-room amenities, including ironing boards, coffee makers, iPads & decor
- Larger flat-screen televisions
- Upgrades to A/V equipment
- Equipment to support social media initiatives

Corporate Negotiated Hotel Rate Growth Will Be Modest in 2018



While hoteliers are still operating from a position of strength, with occupancy lingering at a record 65.5 percent, buyers are gaining ground at the negotiating table for 2018, Hanson said. Corporate and contract rates represent almost 20 percent of occupied U.S. room nights and nearly 30 percent of U.S. lodging revenue.

WHY 2018 INCREASES WILL BE CONSERVATIVE

- In recent years, corporates negotiated rates increased significantly as hoteliers anticipated average daily rate growth that never quite materialized. Corporate travel buyers & convention planners "will seek to recover some of those higher rates," Hanson said.
- Tradeoff after hotel companies introduced direct-booking loyalty member rates & Marriott & Hilton enacted 48-hour cancellation policies
- Airbnb penetration into the business travel market

Hanson's findings are estimated based on interviews with hotel executives, hotel design and construction executives, corporate travel executives, industry financial data, brand standards, press releases, media reports, and hotel property and brand websites.

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BTN'S 2017 AIRLINE SURVEY



Delta IS NOW **BTN'S**
Winningest
Airline

By Michael B. Baker

Delta Air Lines claimed a record-setting seventh year atop BTN's annual airline survey of corporate travel managers and agents, once again steamrolling its competition and earning the top score in every category by a healthy margin. Across the 20 years that BTN has conducted its survey, Delta now stands alone as the winningest carrier. Both American Airlines and pre-United-merger Continental Airlines had six wins over the years.

Scores in last year's survey rose nearly across the board, but they were a bit more mixed this year. Overall rankings of the four largest U.S. carriers remained the same as in 2016.

Delta improved its score in every category, boosting the premium over its nearest competitor for total score to 0.85 points, on a five-point scale, compared with its 0.77 lead in the 2016 survey. American Airlines held onto its second-place spot, improving its score both overall and in about half the categories, but third-place United Airlines tightened the gap between the two to a hundredth of a point, improving in seven of the 10 categories. Southwest Airlines, meanwhile, lost a bit of ground compared with last year, improving in only one category.

What hasn't changed in the past year is that all four carriers remain comfortably profitable, which affords them the capability to invest in new services, new aircraft and their sales teams. American Airlines CEO Doug Parker made a media stir this fall by telling reporters and analysts that the carrier would never lose money again, even profiting in the down cycles. At The Beat Live conference this year, Parker clarified that those remarks were not meant to be braggadocio but to reflect a new era for airlines in which reinvestment remains at the forefront. "As long as we keep pretending the past is the present—that we can't afford investment, that we need to save money for a rainy day—we hold ourselves back," Parker said. "This industry is permanently and fundamentally transformed, and it's important to acknowledge that."

Delta's Continued Evolution

In its years at the top of BTN's list, no one could accuse Delta of coasting, as it has improved its total score each year. This year, its total score reached 4.4 out of 5, up a tenth of a point from last year and from 3.14 in its first year atop the field. Global sales SVP Bob Somers said the improvement is a validation of Delta's strategy. "We're always evolving to meet the needs of our customers," he said. "This is visible affirmation that, in the eyes of our customers, they recognize that we continue to reinvent ourselves and meet their needs."

The most effervescent comments praised Delta's willingness to communicate with travel buyers. Among the survey's 10 categories, in fact, account managers and sales reps is the area in which Delta received its highest individual score. Several respondents cited their own sales reps, while others attributed Delta's achievement in the category to the sales team as a whole. The carrier's score in this category was more than a point higher than its closest competitor, the largest gap in any category. One travel buyer said Delta implements their service-improvement suggestions within two to three months. "Delta really listens to the corporate traveler manager and always looks out for what's good for all, not just their bottom line," the buyer said.

This year, Delta relaunched its portal for buyers and travel agents, adding more self-service options, including the Delta Edge Wallet point system that manages upgrades and vouchers, said sales operations and development VP Kristen Shovlin. Its Delta Edge Meetings product, introduced in

2016 largely in response to requests from its corporate advisory board, also has grown and is in hundreds of travel programs, Somers said.

In addition, Delta this year expanded its Corporate Priority Program, which offers benefits to travelers in corporate programs regardless of frequent-flyer status. This year's expansion gives onboard crews the opportunity to recognize corporate travelers and thank them for their business, Shovlin said.

In BTN's survey, customer service for travelers was Delta's second-highest-scoring area. "Delta has made tremendous efforts to reward our corporate customers and make good on their corporate commitment," one buyer said. "I've seen it at the airport, with sales support and with my representatives. They are huge leaps and bounds above the other legacies."

Networks, partnerships and frequencies was another high-scoring area for Delta, and several buyers particularly praised its joint venture with Aeromexico, which was approved late last year. This year, Delta, Air France-KLM and Virgin Atlantic announced they will combine their partnerships into a single JV. Delta also formed a JV with Korean Air. CEO Ed Bastian said during the carrier's most recent earnings call that Delta has invested about \$2 billion over the past five years in its partner

carriers, which also include Gol and China Eastern. Somers said, "These are all things that speak to being more integrated and deeper with our partners than any other alliance in the world."

Delta continues to lead its competitors operationally, as well, and is improving its own performance, he said. As of early November, it has had 189 days with no cancellations across its entire system, just four shy of its total in all of 2016. Two years ago, Delta introduced its operational guarantee, in which customers would get compensation should Delta's on-time and cancellation performance fall below both American's and United's. United soon followed with its own guarantee, and operational performance for all carriers has been on the rise. "Operational reliability is even more pronounced this year and continues to be a differentiator," Somers said. "They've made the industry better, as well."



American Pumps Up Sales Efforts

American improved its score slightly, by 0.02 points, in BTN's 2017 survey. With heavy investment on the sales side this year, the carrier hopes for bigger gains moving forward. It has filled 100 of the 132 new sales positions approved for 2017, global sales SVP Alison Taylor said. The result has been a "fresh mix of associates," including some brought in from rival carriers, that has "led to a great vibe and a lot of movement, training and onboarding," she said. During an October earnings call, SVP of revenue management Don Casey said American has grown its corporate market share in each of the first three quarters of 2017 and has added 16,000 small and midsize corporate accounts this year.

American improved its complaint resolution score on BTN's survey and moved from fourth to second in that category. One buyer in the survey said, "American's customer service department is more responsive than other carriers."

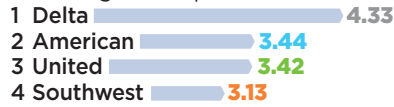
The sales support team now answer calls at any hour and has reduced the number of calls by lifting caps on Flex Funds, with which buyers and agents can manage and access fee waivers, according to Taylor. American also ramped up training for customer-facing employees, has improved its reaccommodation program for travelers with canceled or delayed flights or missed connections, and introduced baggage notifications through its app, she said.

American also improved its score in meetings travel pricing, Taylor said

BTN'S 2017 AIRLINE SURVEY

TRANSIENT PRICING

Customizing discounts & other negotiated prices



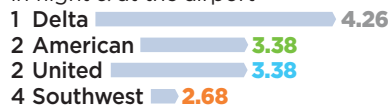
MEETINGS TRAVEL PRICING

Customizing discounts & other negotiated prices for preferred travel buyers



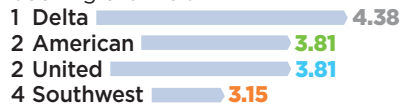
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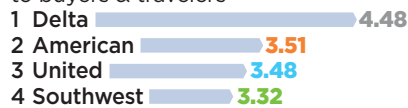
DISTRIBUTION

Providing comprehensive published & private content through preferred booking channels



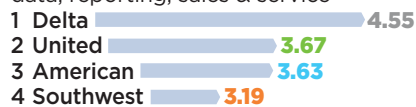
COMPLAINT RESOLUTION

Responding quickly & effectively to buyers & travelers



COMMUNICATION WITH BUYERS

Informing buyers of changes in airline management, products, programs, data, reporting, sales & service



ACCOUNT MANAGERS & SALES REPS

Participating in productive & frequent meetings & holding the power to negotiate agreements, offer options & make price & service decisions



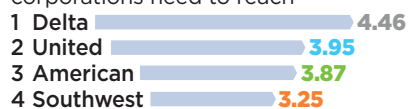
CUSTOMER SERVICE FOR TRAVELERS

Timeliness, reliability, cleanliness, support & communication



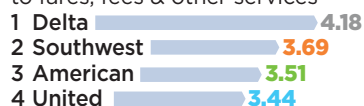
NETWORKS, PARTNERSHIPS & FREQUENCIES

Service to the destinations corporations need to reach



VALUE

Worth of service levels relative to fares, fees & other services



that could stem from a recent relaunch of its group conferencing and incentive segment. “Last year, if large corporate accounts wanted to book a group, we would have to refer them to revenue management,” she said. “Now, it’s managed in sales and we have a new group booking system and shopping experience for users.” That platform is common between American and British Airways, Iberia and future joint-business partner Qantas, and the carrier also has enabled prepayment for group baggage. Additionally, American has made seat assignments more flexible in group bookings for those that wish to sit together, she said.

American is piloting customer portals with some of its corporate customers that provide marketing information, specials and other data to travel managers. The carrier plans to provide them more widely early next year, Taylor said.

United Scores on Network

It’s been a tough year for United’s public image, but the carrier’s reputation among corporate buyers has improved. Its score in BTN’s survey increased for value, transient pricing, meetings travel pricing, services and amenities, distribution, complaint resolution and networks, partnerships and frequencies. United’s operations also have improved, particularly its on-time performance, worldwide sales SVP Dave Hilfman said. “We have a lot fewer complaints than we’ve had, and when we do occasionally have an issue that needs resolution, we have systems in place to respond quickly,” he said.

For the networks, partnerships and frequencies category, United received the highest score in any category other than Delta. Hilfman attributed United’s performance in that category to always “looking for opportunities where we would line up well with corporate client demand, particularly internationally.” In addition to major international route additions, such as Los Angeles-Singapore, the carrier also is growing its domestic network for the first time in several years, both increasing current frequencies and adding midsize-community destinations, he said.

Several buyers specifically praised United’s Jetstream portal, introduced this year. The tool allows buyers self-service for penalty waivers and Economy Plus upgrades, which had made up the majority of calls to United call centers. The portal also provides operational statistics and other relevant news. “We’ve been listening to clients and what they want, so there are developments forthcoming with future waiver types,” Hilfman said. “We’re very excited about the impact Jetstream has made on the marketplace.”

Buyers also cheered United’s move this year to become the first airline to go live with Concur TripLink. One buyer said it “gives me visibility and my travelers choice, so we’re anxious for others to follow along.”

Southwest Adjusts Sales Structure

Southwest’s score on BTN’s survey declined 0.18 points year over year, dropping in all categories

except meetings travel pricing. Even with the declines, Southwest continued to outscore both American and United in its two best areas: customer service and value. The latter has traditionally been a strong category for Southwest, as it remains the sole major carrier not to charge bag fees or change fees. As for customer service, Southwest has invested in a big way in hospitality,” including flight attendants and customer service at airports, said business development managing director Dave Harvey.

This year, Southwest has doubled the size of its sales organization, and it’s looking to build on that



“As long as we keep pretending the past is the present—that we can’t afford investment, that we need to save money for a rainy day—we hold ourselves back. This industry is permanently and fundamentally transformed, and it’s important to acknowledge that.”

—AMERICAN AIRLINES’ DOUG PARKER



next year. “2017 was more about professionalizing and building a foundation, trying to create technical skills, contract skills and skills around service and operations analytics,” Harvey said. “Now, in 2018, we can scale and extend the team with more direct selling resources.”

In the meantime, contracting at Southwest has risen year over year in both renewals and new corporate customers, he added. The carrier also built up service at Cincinnati this year. Delta had downsized its hub there significantly after its 2008 merger with Northwest Airlines, and Harvey said Southwest’s buildup was “a big corporate play.” Similarly, Southwest has built up its network within Florida, will expand its service out of Oakland next year and is working on flights to Hawaii, which will “get us in all the major markets in the United States,” he said.

Another potential score-booster for next year is Southwest’s May 2018 switch to a new Amadeus-based reservations system. The carrier is developing plans around the capabilities this move unlocks, including allowing self-service when travelers need reaccommodation during irregular operations, adding red-eye flight options and enabling interlining and codesharing with other carriers. That last one, in particular, Harvey said, could open up chances of courting corporate customers with global needs. ■

AIRLINE SURVEY METHODOLOGY

From Sept. 9 to Oct. 20, BTN collected 561 responses from travel manager and buyer members of the BTN Research Council and subscribers of BTN and Travel Procurement and 86 responses from travel agents. Eleven percent spent \$500,000 to \$1.9 million on U.S.-booked air volume in 2016, 38 percent spent \$2 million to \$12 million, and 35 percent spent more. BTN developed the categories with travel buyers, corporate travel agency managers and airline sales executives. It averaged scores in each category to create an overall score for each carrier, weighing each category equally. Respondents graded only those airlines with which they negotiated a contract or booked a meaningful amount of business in the past year. Participants who offered no response for a particular category or airline were not included in that category or airline’s average rating. The survey listed the largest domestic airlines as identified by the U.S. Department of Transportation, excluding regional affiliates of major carriers. Alaska Airlines, Frontier Airlines, JetBlue and Virgin America elicited responses from less than 25 percent of the final survey sample and therefore were excluded from this report. Equation Research hosted the survey and tabulated the results.

5TH ANNUAL

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SpotHero Wins BTN's 2017 Innovator Award

At The BTN Group's recent Innovate conference, the Innovator of the Year, so named by our expert judges, was a supplier that solved pain points for both corporate travelers and their travel managers: SpotHero takes the uncertainty out of finding a parking spot for travelers and helps travel managers capture, see and report on an opaque area of travel spend.

"It takes the average driver 20 minutes to find a [parking] spot," said SpotHero strategic initiatives manager Becca Rabinowitz. "Instead of looking for parking on the street and making circles, you can actually look for parking right in the SpotHero app and all available parking will come up." As Priceline and Hotels Tonight do, SpotHero negotiates discount pricing for excess inventory from lots, garages, airports, office buildings and valet services in 78 U.S. cities. "Parking is a perishable item," she said.

"They're happy to [sell it at a discount] because otherwise they wouldn't sell the spot anyway."

Travelers use the app to prepay—they can toggle between personal and corporate credit cards—and to scan a QR code to access and sign out of a spot. SpotHero sends receipts to users' Concur, Certify and Expensify accounts and includes expense notes the traveler has added in the SpotHero app. From the dashboard, travel managers can download parking spend data, including traveler notes, which aid in client-billable expenses. To illustrate savings potential, Rabinowitz's presentation profiled a pilot client whose 3,000 employees made 10,000 parking reservations over 11 months, at an average price of \$31. Considering SpotHero's average parking price is \$19, that 38 percent in potential savings would have totaled \$125,000.

The judges were impressed with SpotHero's ability to capture parking spend, which travelers often pay for in cash. "It's always good to try to get as many types of purchases [as possible] under control as a travel manager. This is a new area, and some of the numbers were pretty impressive," said Travel Tech Consulting president Norm Rose, one of the judges (see page 14). They also appreciated the data analytics, the variety in inventory, and the discount pricing. —JoAnn DeLuna



SpotHero's Becca Rabinowitz

PEOPLE'S CHOICE: DVI



DVI's Brian Beard

DVI is known to many as a data-visualization platform, but as president Brian Beard told Innovate attendees: We're so much more than

that. DVI offers data aggregation, data cleansing, data reconciliation and data normalization in order to solve "the 40-year-old problem of data quality in this industry."

Using data science, machine learning and visualization sciences, the company offers a robust, intuitive and actionable intelligence platform that enables users to parse data from a wide swath of sources, including supplier, card and external data. Through a series of tabs and filters, users can look into overall program spend, then dig deeper to, for instance, examine overall meetings spend, then dig even deeper to see insights around meetings patterns, meetings leakage and even AV costs for internal meetings versus external meetings. In another scenario, a travel buyer could compare the spend on rental cars versus on-demand services in a certain market and identify how shifting spend to one or the other might save the program money. DVI uses an open API and connects with "anybody and everybody" to send and receive data.

DVI's offering may have been a crowd favorite, but the judges also liked the story DVI was building around the data and the flexibility it offers, not just in visualization but in satisfying the diverse needs of corporates. The lingering question for the discerning panel, however, was: With all the richness DVI delivers in its visualization tools, could it also deliver on simplicity? How easy would it be for a manager to create a top-line report for a CEO, for instance, without the bells and whistles of filtering and deep dives? —Julie Sichel

JUDGES' HONORABLE MENTIONS

Not only was DVI the audience's People's Choice at the BTN Innovate conference, the judges also named it an honorable mention, along with two others:

MEZI



Mezi promises to convert a traveler's phone into a personal and powerful travel assistant for booking and trip management. This AI-based platform utilizes both bots and human travel

agents to assist travelers via its messaging platform. The human agents help to train the bots and step in when requests get too complicated for the bot to handle. With each interaction, the bots become better and the living profile of each traveler is updated with personal preferences and behavior.

The judges liked Mezi's user experience and appreciated that "rather than just chat, it's looking at the DNA of a travel request." Right now, Mezi's chatbot-to-human ratio for handling requests is 60:40. Within six months, it hopes its bots will handle 80 percent of requests. The judges liked that ambition and Mezi's pilots with travel management companies like Casto Travel but said it remains to be seen whether Mezi's request handling is more efficient than other means. —Julie Sichel

TRIPISM



For travelers, the social platform Tripism offers trip planning, research and interaction capabilities with supplier reviews from

colleagues and other useful information, such as which hotel or restaurant colleagues frequent most in a given area and which restaurants abroad accept American Express cards. Travel managers gain insight into traveler sentiment about hotels, restaurants and airlines, then can work with suppliers to improve traveler experiences, and Tripism enables suppliers to create promotions and display richer content than would be possible through traditional distribution channels.

Judges appreciated the engagement Tripism provides with corporate travelers. They also loved the openness of the platform—Tripism is booking agnostic—and the fact that the company is willing to collaborate and partner with others like Dinova. —Julie Sichel

CONTINUED ON PAGE 14

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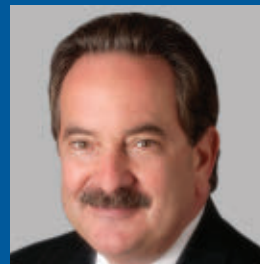
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MAXIMILIAN WALDMANN
CEO of Conichi, which
was the 2016 Innovator
of the Year

THE COMPETITION

BLACKLANE

Chauffeured car service platform Blacklane integrates with global distribution systems, travel management companies and Finnair to allow travelers in 53 countries to book rides in advance, including near on-demand bookings. It also connects to Amadeus to access passenger name records. The set rate includes taxes, tolls, fees, gratuities, an hour of free wait time for airport pickups, 15 minutes for other pickups and free cancellations an hour before one-way transfers and 24 hours before hourly bookings.

BTN's judges appreciated Blacklane's GDS integrations, which allow travel managers to receive data easily. They also liked the all-inclusive pricing and the lax cancellation fees. The service's licensed drivers mean companies avoid the duty of care risk people associate with ride-sharing services like Lyft and Uber, they said. The judges suggested, however, that Blacklane clearly communicate how its prices compare with other ground transportation options' final prices so travel managers can designate use cases in their travel policies. —*JoAnn DeLuna*

BREATHER



Breather operates 500 professionally designed meeting spaces in 10 cities. The locations' capacities range as large as 70 people. Through an app or the web-

site, meeting arrangers can book as little as an hour in advance and add amenities like A/V equipment, whiteboards, TVs and access to kitchens and waiting rooms. Breather also can arrange catering.

Judges said Breather aids difficult-to-manage small meetings in an innovative way. However, they felt adoption by those who arrange small meetings, such as admins, would be challenging. They also anticipate that Breather will have trouble scaling the business in a timely fashion, as the design Breather touts for its spaces will take time and manpower for each one. —*JoAnn DeLuna*

DEEM



Deem's Intelligent Attach aims to solve a small problem that is nevertheless a big headache for travel managers.

The solution targets travelers who already have booked their flights but not other parts of the business trip. It recommends hotel and ground transportation options that travelers can book easily, thereby increasing attachment rates. The recommendations are based on traveler histories and preferences, as well as corporate policies and preferred programs. The solution not only works with Deem's suite of products but also can be deployed across any booking tool.

The judges praised Deem for targeting a pain point within the industry. But they raised concerns about capturing out-of-channel bookings and noted that Deem's hotel attachment conversion rate was "pretty low" at 1.5 percent. —*Julie Sickel*

DINOVA

Dinova's network of more than 14,000 restaurants allows companies to earn rebates and offers them visibility into dining transaction data. It partners with travel apps, corporate card providers and booking and expense tools to reach travelers where they are, and the app lets travelers search for restaurants by location and price point. It also serves the traveler experience by using behavioral data, traveler preferences, itinerary and geolocation info to deliver real-time recommendations, and it offers rewards to motivate travelers to eat at restaurants within the program.

The judges liked the quick and simple onboarding for corporate travel programs and the immediate return in savings. Still, they felt Dinova, which has been around for nine years, could be more technologically advanced, especially in terms of analytics and showing value and opportunities. They suggested Dinova develop its application programming interface and Web services and engage with third parties to build out its ecosystem. —*JoAnn DeLuna*

FCM TRAVEL SOLUTIONS



FCM Travel Solutions presented its Smart Assistant for Mobile tool, but you can call it Sam. The AI-powered chatbot interface manages itineraries for anything booked through FCM, as well as bookings emailed in and added manually. Sam sends context-aware and time-sensitive alerts and messages to travelers, such as, “You need to leave for the airport now if you want to catch your flight.” Travelers, in turn, can change or cancel bookings directly through the app, regardless of the booking source, and connect instantly with an FCM travel consultant in the same platform.

The judges commended Sam’s user experience controls but wondered how much it could change the market, given that it’s a product for a particular travel management company. The judges also desired more clarity about when a request is handed off between the chatbot and travel consultant. —*Julie Sickel*

GROUPS360

Groups360’s GroupSync meetings and events sourcing platform allows meeting planners to filter venue searches by date, preferred markets, meeting size, amenities, travel time and other factors. GroupSync uses artificial intelligence to identify and display properties, estimated rates, historical occupancy and spaces booked by other meetings of similar size. Hotels can customize their listings with photos and additional information like renovation updates and number of restaurants. The system summarizes choices, including how the properties scored on the meeting planner’s needs, estimated rates and search criteria.

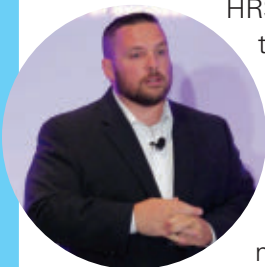
The judges were impressed with Groups360’s management team of hotel vets and with the tool’s search functionality. However, they were concerned about limited inventory and the lag time between searching and receiving rates. They also were unclear how Groups360 solves the RFP issue, as the company claimed to do in its presentation. —*JoAnn DeLuna*

FLIGHTSAYER

Flightsayer uses real-time and historical data feeds like weather and FAA flight data to determine the likelihood of delays and cancellations. Before booking, travelers can see a flight’s score, or they can email itineraries to Flightsayer so the service can monitor their booked flights. The company notifies travelers when the likelihood of disruption increases, and it shares alternative flight options but does not facilitate rebooking. Flightsayer partners with Adelman and a few BCD Travel affiliates—and is in talks with more travel management companies and global distribution systems—to feed client itineraries into Flightsayer and push Flightsayer data to TMCs’ apps or agent platforms.

The judges thought it was a thoughtful, creative and innovative solution to manage flight delays proactively, especially for corporate VIPs, but they wanted the flight alternatives to include a clearer explanation of each potential transaction’s cancellation and change fees. —*JoAnn DeLuna*

HRS



HRS is looking to kill the annual hotel RFP. Its Active Sourcing solution shifts the process from the once-a-year model to one of continual monitoring and management, supported by HRS’s existing suite of products, such as Rate Protector. Clients determine which key performance indicators are most important to their programs, and HRS analyzes programs’ hotel data on an ongoing basis to see which hotels are and aren’t being used, to identify new opportunities and to fuel dialogue with hotels that aren’t producing.

For the judges, however, the presentation would have benefited from a clear visualization of the client dashboard and a deep dive into the levers and products available to clients who choose Active Sourcing. —*Julie Sickel*

GROUNDLINK

Brio, GroundLink’s black car booking platform, gives travel programs insight into their upcoming and completed rides, rides in progress, frequent users and overall ground transport spend. It also tracks flights and adapts pickup times based on the adjusted flight arrival times. Clients in 110 countries can book in advance by app, website or phone. Select cities allow on-demand bookings. Drivers are licensed and insured, and the fleet ranges from a three-person economy car to a 40-person party bus. GroundLink offers as much as \$75 off the passenger’s next ride if the driver is more than five minutes late.

The judges liked Brio’s modern look, corporate controls and ability for travel programs to incorporate their travel policies into the platform. They suggested GroundLink ensure that it distinguishes itself from other on-demand car services like Lyft and Uber to avoid a reputation as simply “a more expensive Uber.” —*JoAnn DeLuna*

TRAVELPORT LOCOMOTE

Locomote is built in the spirit of an end-to-end workflow solution for the corporate travel market. The platform uses modules—such as a procurement module, a message and audit module and a booking module—to enable corporates to construct workflows that best fit their travel program needs. Additionally, Locomote integrates other pre-built and third-party solutions into the platform.

The judges lauded the more modern user experience for both the program manager and the traveler and appreciated the unique and flexible workflow capabilities. However, they worried about information capture—for now, Locomote requires off-channel data to be forwarded. The judges also wondered whether Locomote could successfully implement more travel management companies and if the platform really creates a new booking paradigm for corporate travel. —*Julie Sickel*



Alitalia Is Now Judging the Suitors That Propose to Lead It Out of Bankruptcy



ALITALIA CHIEF COMMERCIAL OFFICER FABIO MARIA LAZZERINI

The Italian government is reviewing seven proposals to bring Alitalia out of bankruptcy. Those potential buyers include Lufthansa and EasyJet. Still, Alitalia executives insist the carrier will not accept a marriage of desperation. New chief commercial officer Fabio Maria Lazzerini said Alitalia's financial situation has improved since it began bankruptcy proceedings this year. He spoke with BTN transportation editor Michael B. Baker.

What's the status of administration?

Potential companies [had] until Nov. 5 to present their offers. The offers will be binding offers for the ones presenting their offers, not for Alitalia. Alitalia management, along with the commissioners and the government, will evaluate the offers. The preference will be for the bidders that create an offer for the entire company, not for small pieces of it. The government intends to keep the company whole, Italian and operating out of Italy and keeping the name. We then will open individual negotiations with potential bidders to improve those bids.

What's happening with operations?

The company is launching its new service for the winter season. We are already planning new service for the summer season. For the first time after three years, revenues are up compared with the previous year. The first six months of the year, EBITDA was positive by 46 million euros. Last year was negative. We are planning to grow EBITDA. It doesn't mean we will not generate losses but much lower than the previous years. This is important for the stability of the company, despite what happens with the process. When the administration started on May 2, the government gave Alitalia a bank loan of 600 million euros [and in October increased it to 900 million euros] to protect the company and make sure Alitalia could continue to operate. That has [barely] been touched yet because Alitalia managed to generate enough cash to sustain itself. That allows us to have long-term planning.

The [Italian] Civil Aviation Authority gave back to Alitalia the unlimited license to fly [after] 10 months [with] a temporary one. The commissioners have the power of reducing costs even further because they can terminate any contract at their own will. Some costs have been terminated like a contract on the fuel price, which was way negative for Alitalia. Other contracts represent further opportunity of savings.

We are completely redoing Alitalia.com, making it much more modern and more integrated not only with the sales process but the check-in and post-sales processes.

What about with corporate business? Are you continuing to negotiate and renew contracts with corporate travel programs and travel management companies?

Corporates are important. We are talking with the direct customers and can partner even better with the TMCs. We

"I'm not saying all the problems of Alitalia have been solved. It still needs a strong partner, which can be a financial institution, an investment fund, another legacy carrier, a low-cost carrier, a European carrier."

are reinforcing the team looking after the global corporate accounts, both [agency] and companies. A new VP joined to be responsible for global sales to bring back focus on this side of the business because it is the most profitable one. We need to balance [business from Italian companies], which is 45 percent of the overall revenues of Alitalia, with the relationships outside Italy. Italy is a market where [small and midsize enterprises] are very important. Something like 95 percent of the Italian companies are below 200 employees; you cannot go for a super-corporate global agreement, but they're important. We have a program called Alitalia BusinessConnect. It's basically a program where both the company and the flyer accrue miles they can use.

What is the route growth you mentioned?

We [launched] Male [in the Maldives and] New Delhi at the end of [October], and we are operating Los Angeles for the winter season. We are planning further growth next summer, something in Africa. Potentially, we will work with [Delta through our joint venture] to see if there are other opportunities to increase frequencies or coverage of North America. We have integrated [with Delta] and are pushing to be even more integrated. I'm not saying all the problems of Alitalia have been solved. It still needs a strong partner, which can be a financial institution, an investment fund, another legacy carrier, a low-cost carrier, a European carrier. Alitalia needs to be reinforced because we need to increase our capacity to operate a long-haul network.

You had your own plan before administration began. Will your choice of which proposal to accept depend upon that?

We are presenting our own plan. It doesn't mean we'll have only one partner. It could be an investment partner and another airline. We have a standalone plan, which would be with an investment fund, where the majority of the development is on long haul. We have other plans where we can mix our plan with a potential carrier that is going to invest in the company. Our goal is to increase the long-haul connectivity. That's the only way. We can still compete well with the low-cost carriers, but we cannot do only that; it can be a portion to feed our long-haul connections. The [other] component is the medium haul, the connection between Italy and European cities where EasyJet and Ryanair are working with very low fares. We could go to low fares, but then we lose money. We can [use] our network to feed the international flights and be creative in other connectivities. We have always competed with the high-speed train, but there can be some integration [instead].

What's happening at the management level?

In the past six months, the commissioners terminated 32 of the top managers, the foreigners who came during the Etihad period, so there is some fresh air coming in. I've been the general manager of Emirates for four years. The revenues are coming in despite this situation, especially on the Italian market. One of the reasons Chapter 11 exists is to allow the company to reshape its future. You need that phase to go back to your roots and decide what you want to be. ■



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CONTINUED FROM FRONT PAGE

the GDSs. Lufthansa's 16 euro per-ticket fee took effect in September 2015. International Airlines Group's British Airways and Iberia enacted their own surcharge on Nov. 1 that amounts to \$10 per fare component, generally defined as a one-way ticket or half a round-trip. And Air France-KLM has just joined the club, planning to launch its 11 euro per-way fee in April 2018. Ultimately, because these airlines no longer commit to full content, they lose the discounts GDSs had given them, but they also now are free to control the "merchandise" they put out and to levy surcharges on GDS bookings.

Airlines have explained that their surcharges for GDS bookings basically cover the premium it costs airlines to distribute via GDSs. For example, the new structure means IAG airlines now pay GDSs more per booking. "We are clear that the transition involves an increase in costs," IAG CEO Willie Walsh said. "This is in the short to medium term not a cost-reduction issue. In fact, it will add to our costs."

For the most part, many airlines prefer customers book on the airlines' direct channels, such as their own websites. Here, airlines say, they have better capability to sell ancillaries to customers, can exert greater control over bookers' experiences, can glean better data on their customers and can facilitate a more direct relationship with customers.

The International Air Transport Association has developed the New Distribution Capability standard to help airlines close the perceived gap between their direct and indirect channels. In other words, NDC-based connections—which could be adopted by travel agencies, content aggregation companies or the GDSs themselves—can give airlines that kind of control even via indirect distribution channels.

Got it? Now here's what's happened lately.

The private-channel exception to the surcharge "is only going to increase the skepticism of buyers that its NDC strategy is all about cost of distribution rather than the claimed benefits of enhanced content, personalization and working in a very different way with corporate customers."

—A CORPORATE TRAVEL BUYER

Air France-KLM Joins Lufthansa & IAG's Club

Air France-KLM's surcharge on GDS bookings, announced this month, will apply when Air France, KLM or the group's Hop carrier participates as a marketing carrier on an itinerary. In January, the group will launch its NDC-based application programming interface, and on April 1, the day the surcharge takes effect, it also will release an online direct booking portal. Both are channels via which travel agencies can make bookings without facing the GDS surcharge.

Air France-KLM noted the distribution surcharge will cover the cost of distributing and making a sale via the GDS versus the cost of a direct sale. Its commercial and distribution costs rose from 690 million euros for the first three quarters of 2016 to 701 million euros for the same period this year. CFO Frederic Gagey said:

TRADITIONAL MODEL

AIRLINES GIVE THE FARES AVAILABLE FOR SALE TO GDSs

GDSs charge airlines for transactions



A GDS discounts its transaction fee if an airline:

- shares its full, complete inventory with the GDS
- offers that content at the same price as on other distribution channels
- agrees not to surcharge GDS bookings or "discriminate" against the GDS's users in any other way

GDSs DISPLAY AIRLINE CONTENT

GDSs pay TMCs incentives for meeting booking volume thresholds



TMCs SHOP & BOOK ON GDSs ON BEHALF OF TRAVELERS/ TRAVELERS' COMPANIES

EUROPE'S BIG 3 ARE TAKING A DIFFERENT TACK

Airlines want to be able to customize & package their "merchandise" for different travelers & companies, such as packaging free checked bags with certain fares as part of a corporate negotiated fare. Thus Lufthansa, IAG & Air France-KLM have:

- opted out of full-content agreements with GDSs
- surcharged GDS bookings

The results? Airlines give up the transaction fee discounts they were getting from the GDSs but can customize their content and distribute it on non-GDS channels, as well. TMCs, meanwhile, may lose incentive revenue if their clients opt to book through non-GDS channels.

HOW WILL THE MONEY FLOW?

GDSs are indicating they plan to jump on the NDC bandwagon. Where bookings will go & how the money will flow remain to be seen.

"There is an immediate effect, which is that we pay more to the GDS. This is compensated by the GDS surcharge." Air France-KLM also anticipates that switching some business to other channels will offset the higher fee it will

pay the GDSs for each GDS booking. "All in all ... it is neutral in year one and positive in year two." Similarly, Walsh said IAG's distribution strategy is "an investment in the first year and return from the second year onwards."

According to Air France-KLM's third-quarter investor presentation, switching to NDC means "taking back control of [the] offer for all channels, allowing creation of personalized offers, dynamically built product bundles [and] rich offers and content."

After All That, Though, BA & Iberia Are Waiving the GDS Surcharge for Some TMCs

British Airways and Iberia enacted their surcharge on Nov. 1. Yet some large corporate TMCs are empowered to continue to book on GDSs without paying a fee.

Around the time BA enacted the fee, it arranged to waive its surcharge for select travel agencies when their clients book through GDSs that agree to the arrangement. Amadeus was the first of the three major GDS operators to buy in to this "private channel" model. Sabre followed this month, and at press time, Travelport also was poised to support agencies under the model. American Express Global Business Travel (see Q&A at right), BCD Travel, Carlson Wagonlit Travel and HRG are among the TMCs participating. Essentially, these TMCs gain access to the airlines' surcharge-free content while agencies that aren't in the private-channel club do not.

The fact that this private channel is available only to some agencies led one travel buyer to say, "The surcharge is only going to increase the skepticism of buyers that its NDC strategy is all about cost of distribution rather than the claimed benefits of enhanced content, personalization and working

in a very different way with corporate customers.”

Still, there are other ways for agencies to avoid the surcharge. BA and Iberia have developed cloud-based tools, including a corporate booking portal for corporate clients and a tool for TMCs. Through those portals, IAG is offering the ability to book, change and cancel BA and Iberia tickets, including negotiated fares. BA and Iberia’s portals also support corporate policies and provide corporates access to ancillary products. Further, the airlines are providing “a standard XML feed for agents to integrate to their mid- and back-

“We are clear that the transition involves an increase in costs. This is in the short to medium term not a cost-reduction issue. In fact, it will add to our costs.”

—IAG’S WILLIE WALSH

office systems.” Lufthansa similarly offers an agent portal and, as mentioned, Air France-KLM’s is in the works.

Yet another way to avoid the surcharge is to book IAG-operated flights through codeshare partners, including American Airlines. This is true of Lufthansa and Air France-KLM, as well, where codeshare bookings are not subject to the surcharge.

Ultimately, the GDSs themselves have embraced NDC. Each of the major GDSs has put time lines in place for full NDC compatibility. All say they will be NDC-certified at the highest level by the end of next year, which means the technical capability will exist for airlines to control the content they distribute via GDSs. What economic models will emerge among airlines, GDSs and TMCs, then, remain to be seen. According to IAG’s Walsh, “We’d like to have a relationship with the GDS, but we think the traditional model is no longer fit for purpose, and we need a model that works to the future and not one that is structured around the past.”

—Reporting by Jay Boehmer & Amon Cohen

How One Mega TMC Views Its “Private Channel” Privileged Access to IAG’s Full Content on the GDS



AMERICAN EXPRESS
GLOBAL BUSINESS
TRAVEL EVP OF
GLOBAL SUPPLIER
RELATIONS MIKE
QUALANTONE

For American Express Global Business Travel and some other large travel management companies, the International Airlines Group is waiving its new surcharge on bookings facilitated through global distribution systems. BTN distribution editor Jay Boehmer caught up with Amex GBT EVP of global supplier relations Mike Qualantone.

GDSs traditionally strike a deal with an airline to bring content to all TMCs and other subscribers. How is this model different in terms of who’s at the table?

One-size-fits-all doesn’t work, right? So one-size-fits-all is Lufthansa putting a surcharge that everybody has to pay. We don’t think that

works. We would rather work with airlines and GDSs to solve for our customer needs. What [IAG airlines] BA and Iberia realized was: One size does not fit all. So there are certain relationships that they want to continue to give full access to content, that they don’t want to have to surcharge and that they want to try to make ongoing efficient bookings available.

[Amex GBT] is a customer that gives them high-value bookings, and they value the relationship. The problem they have, I would guess, from an airline side is: If they give their content to the GDS ... it has to go to everyone. You have certain agencies that may sell a predominance of low-value tickets—coach, highly discounted, pre-purchased—and you have others that sell more business, more full coach, more ancillaries, more first class. Those relationships are more valuable to an airline.

When I hear airlines talk about New Distribution Capability, they talk about negotiated bundles, more tailored offers and better access to ancillaries. Are there opportunities for enhanced content?

There is. Our objective is to work with the GDSs and BA and Iberia on a way that can make sure that content can be consumed in the GDS.

Honestly, the GDSs have been slow to create the right integration of ancillaries to easily sell them in the same transparent and efficient environment without adding costs. We believe ancillaries is an example where, if we don’t see a more efficient environment [in the GDS], we can work more with the airlines on how to better sell or promote it to our travelers.

For so long, the airline has paid the GDS a booking fee and the GDS has paid an incentive back to the agency. Are there differences in the economic flow with this kind of “private channel” arrangement in which certain TMCs can work through the GDS without penalty?

Our intent was not to change distribution economics. It’s not our intent to use this as a way to try to make more revenue for ourselves. It was about

“There was a lot of commercial discussion about who got paid and how much. Now it’s about who gets my content and how much.”

trying to find a solution. Money flow I really can’t comment on, but the economics themselves should not change. The thing that you see more now than earlier with distribution discussions over Web fares and these other things that transpired over the last several years: There was a lot of commercial discussion about who got paid and how much. Now it’s about who gets my content and how much. That’s a bit of a different discussion, right? That’s something in the GDS contracts known as the content parity, so I give [the GDS] all my content and you give it to everybody. That’s more of a central issue now. What is the definition of content and who gets my content? ■

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Two Initiatives to Ease Virtual Card Payments at Hotels

Omni Hotels has integrated with Conferma Connect, which launched in September 2016 and enables virtual card authorizations via secure email rather than fax. The partnership with Omni, though, took the integration a step further, eliminating the duplicate effort required from clients to fill out an online form to capture virtual card details. “Omni has opened up [the application programming interface] of the Web form to enable Conferma to automate completion of that form,” Conferma head of integrations and communications David Wood told BTN.

Other hotel chains, including hospitality giant Marriott International, require similar forms to process virtual card payments. Not only is it an extra step for clients, such practices are questionable under the Payment Card Industry Data Security Standard. It’s a big enough problem that some travel managers who rely on virtual cards have gone as far as banning employees from booking properties that require such forms.

Wood explained that there are two ways hotels often request the form be filled out and submitted. The hotel could ask travel bookers to return the form via Microsoft Word or Adobe PDF. “PCI compliance is then lost, as everyone’s email involved in that process will receive the card information and [other personal identifiable information],” Wood said. “What happens with those forms when the hotels receive them brings up [additional] PCI compliance challenges. Do they get destroyed accordingly? Do they get left anywhere?”

The second way, as Omni had done until now, is to send a link to an online form. While this method is safer than sending a hard copy, it’s still an extra step. “With Omni, Conferma has been able to remove that,” Wood said.

Gant Plays the Banker

Following the launch of Gant Strategic Pay this year, Gant Travel has launched a second virtual card solution, GantCoin, for hotel bookings. The solution links to a company corporate card, eliminating the need to open an additional bank account specifically for the virtual card to draw funds. “Creating a [separate specialized] account is slow and often requires approvals at many different levels inside a company and bank. This is a hassle that often stops travel managers and travel coordinators from getting the solution they need,” said Gant VP of corporate accounts and sales Chad Seybold.

As with most virtual card solutions, GantCoin is a good option for infrequent travelers, employees without corporate or



AirPlus Launches Its Virtual Card in the U.S.

After much delay, AirPlus International has launched its Mobile A.I.D.A. virtual card solution in the U.S., marking the 14th country to offer the product. CEO Patrick Diemer had told BTN the delay owed to U.S. regulations that required AirPlus to become a bank or to partner with a MasterCard issuing bank; in other countries where AirPlus operates, that was not necessary. AirPlus chose to partner with Birmingham, Ala.’s Regions Bank.

personal credit cards and non-employees, as it offers an alternative payment method to issuing corporate cards. GantCoin is additionally useful for small and midsize enterprises that don’t want to go through credit checks or don’t have good banking relationships, said Gant president and CEO Patrick Linnihan.

GantCoin builds on Gant Strategic Pay’s existing technologies and processes with Concur and Conferma. It therefore works similarly, whether a traveler books a hotel on Concur or through a travel agent, explained Linnihan. Through the Gant Gateway platform, a travel manager can designate which type of travelers get access to GantCoin and determine whether the transaction will cover just room and tax or will allow a buffer for incidentals.

When a traveler makes a booking with Concur, his or her profile will indicate whether the booking is eligible for GantCoin payment. Likewise, a Gant agent will know which travelers are eligible for GantCoin based on the company’s specifications in Gant Gateway.

With Gant Strategic Pay, a traveler initiates a transaction with a corporate or lodge card, Linnihan said. With GantCoin, Gant assumes the risk by fronting the funds from its own account. Conferma then generates the virtual card. Linnihan declined to reveal Gant’s virtual card bank issuer. A day after the trip is completed, Gant’s system automatically charges the company’s corporate card for the final amount, thereby shifting the liability to the credit card network to ensure the company pays its credit card bill. ■

AirPlus Pilots Fingerprint-Authorization Corporate Card

Payments provider AirPlus is testing a biometric corporate card for which users can use a fingerprint rather than a PIN at checkout, AirPlus head of research and development Uli Danz told BTN. The product is supplied by Swedish biometrics company Fingerprint Cards, which incorporates software from Swedish fingerprint software company Precise Biometrics and cards from South Korean financial technology company Kona I. Fingerprint Cards provides the fingerprint sensor and packages the card as a finished product.

Whether chip or contactless, the card comes with a visible, embedded sensor that authenticates a user via a fingerprint. The biometrics data is stored only on the card. Unlike smart card products like Center or Coin, which have to be charged, the AirPlus card charges itself every time it

comes in contact with a terminal. “This energy is enough to serve the fingerprint reader,” Danz said.

The card may not be available to clients for a while. Danz told BTN, “In the credit card business there are a lot of rules, and the rules are not yet set for biometrics or fingerprints on card.” Such rules may determine whether a fingerprint is needed to authenticate every transaction or only transactions over a certain amount, as with some contactless cards. Danz hopes the networks will require fingerprint authorization for every transaction, as PIN cards do, because users could feel secure that a charge won’t happen accidentally, without their authorization. “It would give you a good feeling, even for smaller amounts,” he said.

In 2016, BMO and MasterCard incorporated biometric authentication via

Amex & Hilton Will Offer Four Co-Branded Cards

Beginning in January, American Express and Hilton will offer four co-branded cards to consumers and small businesses. The offering follows the companies' June announcement that Amex would become the exclusive card issuer for the hotel chain's U.S. co-branded credit cards.

Hilton has offered Amex co-branded cards since 1995 and Citi co-branded cards since 2000. Hilton will replace the Citi Hilton Honors card with the existing Hilton Honors American Express card, one of four cards on offer. All four will offer the benefit of no foreign transaction fees.

Hilton Honors Amex card benefits remain roughly the same. The existing Hilton Honors Surpass Card, which has a \$75 annual fee, will be called the Hilton Honors American Express Ascend card and will increase to \$95 a year. Additional card benefits for the Ascend card include 10 Amex lounge passes a year and one weekend stay at a Hilton property after spending \$15,000 within one calendar year. It is unclear whether the basic Honors card or the Ascend card will continue to offer the considerable bonus-point package that kicks in after cardholders reach pre-defined spending thresholds in the first three months of joining the card program. Amex said it will provide more details on sign-up bonuses in January.

In addition to the revised card products, Hilton will offer two new cards: the Hilton Honors American Express Aspire Card for \$450 a year and the Hilton Honors American Express Business Card for an annual fee of \$95.

Issued to the small business segment based on credit qualifications and intended for business travel and related expenses, the Hilton Honors American Express Business Card offers 12 times the points for purchases made within Hilton's property portfolio and six times the points for U.S.-based spend on restaurants, gas, wireless phone services and shipping. Car rentals booked directly from select providers and flights booked directly from airlines or amextravel.com also qualify for six times the points. Cardholders receive complimentary Hilton Honors Gold Status and are upgraded to Diamond status through the next calendar year once they spend \$40,000 on eligible purchases within one calendar year. Cardholders also receive a weekend stay at Hilton after spending \$15,000 in a calendar year and another after spending an additional \$45,000 in the same calendar year. The card comes with 10 Amex lounge passes.

The Aspire card, which is a consumer card, offers increased benefits, like 14 times the points for Hilton portfolio purchases and seven times the points for U.S. spend on restaurants, gas, mobile phone services, car rentals and airline tickets. Cardholders have unlimited Amex lounge access and several opportunities for free stays at Hilton properties, with and without spend thresholds, and enhanced on-property credits. Aspire cardholders also can access 24/7 Amex concierge services. ■

either a fingerprint or photographs of themselves, depending on a phone's capability. The offering was meant for risky transactions or transactions that fall outside a user's typical spending pattern.

Usability

AirPlus began a three-month internal pilot for the card on Sept. 14. Danz said the first tests have been successful. After the pilot is complete and the card networks set rules for biometrics authorization, "there's no technological obstacle to prohibit us from distributing [the cards] in countries where we already issue corporate cards," he said. He declined to estimate how long it could take the networks to set the rules but hopes it will not be as long as for mobile payments.

Pricing and distribution will depend on demand, as the cards would be more expensive to produce. He anticipates demand will be lower in markets like China. There, mobile payments are "quite advanced" thanks to payment company Alipay and to apps like WeChat, which facilitates mobile payments in-app and through QR codes. "When everyone is paying via QR code through mobile, is there a space for such biometrics technology on a plastic card? Probably not," Danz said. "Perhaps we are behind in the U.S. and Europe, but let's be honest: There will be cards out there for the next 10 years for sure. "We're at a point where we can say, 'There is a further option and it's quite convenient, so let's see where it goes.'" ■

Amex Antitrust Case Heads to U.S. Supreme Court

The U.S. Supreme Court has agreed to review an antitrust case against American Express, following a petition by 11 state attorneys general, according to the U.S. Supreme Court website. The court will hear arguments in early 2018 and rule by June, according to Bloomberg. The case challenges Amex's rules that bar Amex-accepting merchants from steering customers to forms of payment that cost merchants less.

"The issues in this appeal involve anti-competitive practices that hinder Ohio consumers and Ohio retailers and merchants"

—OHIO ATTORNEY GENERAL MIKE DEWINE

"The earlier decision ... protects a consumer's right to choose how they pay, prevents our card members from being discriminated against and promotes competition in the payments industry."

—AMERICAN EXPRESS SPOKESPERSON

"The earlier decision by the Second Circuit panel protects a consumer's right to choose how they pay, prevents our card members from being discriminated against and promotes competition in the payments industry," an Amex spokesperson said. "We believe the government's claims lack merit, and we will continue to vigorously defend the Second Circuit's decision in favor of American Express."

In the June 2 petition, led by Ohio Attorney General Mike DeWine, the states claimed the case has national implications and that Amex's rules restrain trade for cardholders and merchants. The states also maintained the Second Circuit was incorrect when it said the cost of anti-steering rules is offset by the benefit to cardholders through rewards and services. The states hope the Supreme Court will require Amex to prove that cardholder benefits offset merchant costs, as it has done in similar cases. That differs from the lower court's burden of proof, which instead required the plaintiff, the U.S. Department of Justice, to prove that cardholder benefits do not offset merchant costs. "The issues in this appeal involve anti-competitive practices that hinder Ohio consumers and Ohio retailers and merchants," DeWine said.

The U.S. appeals court ruled in favor of Amex in September 2016 and in January refused the DOJ's request to reconsider. While the DOJ decided not to take the case to the Supreme Court, the states took it upon themselves in June to petition the U.S. Supreme Court to review the case. ■



Crowne Plaza Makes Flexible Meetings Spaces Part of Brand Standard

BY JULIE SICKEL

In June 2018, InterContinental Hotels Group's Crowne Plaza brand will make its Plaza Workspace flexible meeting solution a brand standard for hotels to implement during renovation.

The news comes after Crowne Plaza wrapped a recent conference with owners and general managers. The conference highlighted new programs and initiatives that grew out of the hotel company's three-year, \$200 million Crowne Plaza Accelerate program, which launched in June 2016. The decision to make the meeting spaces a brand standard came after a pilot that delivered an ROI for property owners within two years, according to the company.

Plaza Workspace includes two flexible meeting space options. The first is a studio rented by the hour with a table that seats six, plus sofas, chairs, a whiteboard, a TV that can project presentations and ample electrical outlets. The second option is a "huddle spot" in the lobby with a flat screen TV for presentations. The brand standard calls for two huddle spots in every hotel, and these spaces don't require a rental. The rest of the lobby will

The Plaza Workspace huddle spot in Denver

The Plaza Workspace studio in Orlando



feature various individual workspaces.

The ROI for property owners derives from the studio rental fee and incremental revenue from food and beverage sales. Each studio and huddle spot comes with an iPad that enables users to order from a menu. "You don't have to interrupt the flow of the meeting. ... You don't have to flag down the server," Crowne Plaza Americas head Meredith Latham told BTN. "You can actually utilize the tablet, place the order, and it will be delivered directly where you are." Each renovated Crowne Plaza also will feature a marketplace with grab-and-go food and beverage.

Other initiatives coming as part of Accelerate include WorkLife guest rooms with amenities like a sofa workspace and outlets at every turn; a core dinner and bar menu that will be standard across the Americas portfolio, complemented by properties' ability to add local chef favorites; new service training for on-property staff; and a dedicated field team to work with sales operators to drive performance on the local level. ■



DoubleDutch Acquires Eventgrid & Names New CEO

BY ELIZABETH WEST

Mobile event app provider DoubleDutch has acquired meetings and event registration and management technology Eventgrid for an undisclosed amount. The acquisition marks a major strategy change as DoubleDutch fully enters the event management space, making a stronger play for enterprise clients. It also marks a major change in executive leadership. Bryan Parker, who joined DoubleDutch this year as COO, will take over the CEO position from DoubleDutch founder Lawrence Coburn. Coburn was named chief strategy officer and will oversee new product launches.

Lawrence spoke to BTN late last year about the company's move toward a more enterprise-focused strategy, saying DoubleDutch was looking to partner with like-minded companies that would help them capture business farther upstream in the event lifecycle. The Eventgrid acquisition shows the company pushing in all its chips on a platform strategy after floundering with two major layoffs in the last half of 2016.

DoubleDutch joins the crowd in a market that's moving decidedly toward platform solutions to compete with Cvent. Etouches acquired Zentila last November, bolting a sourcing solution onto

its technology stack, then took a majority stake investment from private equity to gain more financial backing, plus a marketing automation portfolio partner. On the other end of the spectrum is Event Tribe, a group of six independent solutions that have banded together as a de facto meetings technology platform. DoubleDutch's move positions them to compete with solutions like these; the differentiator, according to Coburn's blog, is modern, scalable technology that is easy to use.

"Eventgrid was built by a team of very senior engineers who had earned their stripes building some big, scalable, and well-known systems," he wrote. "They wrote their first line of code for Eventgrid in 2013, a computing lifetime away from the late '90s when the industry incumbents were born."

That "industry incumbents" translates to "Cvent" is no secret to anyone who has read Coburn's blogs in the past. Whether the new platform will chip away at the incumbents' business remains to be seen. Eventgrid, however, brought some of its own clients to the table, including Sony and the International Association of Information and Data Quality. ■



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Travel Companies Face More Uncertainty over Data Transfers from the EU

BY AMON COHEN

The future of standard contractual clauses, a mechanism heavily used by travel service providers and other companies to lawfully transfer European Union citizens' data to the U.S. and other countries, has been thrown into question after a ruling by the Irish High Court. The court asked the European Court of Justice last month to review whether these clauses are valid, considering the U.S. government's less stringent treatment of personal data.

The ruling came less than a month after Privacy Shield, another mechanism for transferring data from the EU to the U.S., survived its first annual review but came in for renewed criticism.

Standard contractual clauses were used for data transfers by the businesses of 81 percent of the membership of the International Association of Privacy Professionals, according to a 2016 survey of 600-plus respondents. That was far more ubiquitous than any other transfer mechanism. Standard contractual clauses are fixed clauses that a data exporter (client) and data importer (supplier/service provider) insert into contracts to guarantee transfers comply with the EU Data Protection Directive. Failure



Irish High Court

The Irish High Court's ruling on standard contractual clauses & doubts about Privacy Shield have "the potential to derail travel."

to meet those terms is grounds for termination of the contract.

The Irish court ruling on standard contractual clauses followed another case brought against Facebook by Max Schrems, the Austrian lawyer whose original complaint led the European Court of Justice to invalidate Safe Harbor, the forerunner of Privacy Shield, in 2015.

Delivering a 152-page judgment, Irish High Court Justice Caroline Costello concluded that there are "well-founded concerns ... in relation to the adequacy of the protection afforded to EU subjects whose personal data is wrongfully interfered with by the intelligence service of the United States once their personal data has been transferred for processing to the United States." Costello said the matter should be referred to the European Court of Justice for a final determination because of the necessity for a consistent EU-wide ruling on the matter.

Meanwhile, although Privacy Shield passed its first annual review, concerns persist. More than 2,400 companies, including

Travel Industry Weighs Its Own GDPR-Compliant Code of Conduct

BY AMON COHEN

The European Union's General Data Protection Regulation, set to take effect in May, encourages industry segments to draw up codes of conduct to govern how relevant businesses could apply the regulation. So will a code of conduct emerge for travel? The Travel Technology Association—whose members include the three leading global distribution system providers, online travel agents, metasearch companies and Airbnb—is working on the idea.

Article 40 of the regulation states industry associations could prepare such a code to promote data privacy standards related to the collection, processing and pseudonymization of personal data. GDPR also encourages stakeholders to address in industry-specific codes the rights of data subjects—in the travel industry's case, the traveler—and standards for data breach notifications.

Each industry association would have to submit a draft code to a supervisory authority and include mechanisms "to carry out the mandatory monitoring of compliance with its provisions by the controllers or processors which undertake to apply it," according to the regulation.

Travel Tech has co-opted nonmembers

American Express Global Business Travel, BCD Travel and Carlson Wagonlit Travel to form a GDPR working group. Travel Tech president Steve Shur said the group is preparing white papers to address the roles of data controllers and processors, plus rules for transfer of data between GDSs, transfer of data between countries and notices of consent. The white papers could be formalized as a code of conduct or could end up as "more a recommended practice," he said. "We don't envisage asking members to sign up for it." One data privacy professional involved with the working group, requesting anonymity, said: "The first stage will be guiding principles. From what I see, it's trying to get companies to think about how they use personal data. Over time, perhaps there will be a code of conduct."

Amex GBT chief privacy officer Kasey Chappelle is more gung-ho. She has worked on data privacy codes of conduct for other sectors. "These are remarkably valuable tools, especially for complex industries, and the travel industry is complex," she said. "Think about the journey that travel data takes from end to end in any given transaction. You've got the travel

buyer, the GDS, the TMC. You've got the thousands of potential hotels, airlines and car rental companies that can receive the data. They could be located anywhere in the world. And that's not starting to think about the countless data processors that touch the transactions at any stage: the online booking tools, the content aggregators, the duty of care providers, the mobile apps. The list goes on."

With so many players touching any one business trip, Chappelle considers it essential to bring them all "to the table to set standards for how information will be treated in the end-to-end transaction. That's a valuable exercise in itself: to identify, understand and document what happens. But if you're bringing all these parties to the table, why not take the natural next step to bring it to the regulator? Then I can go back to my client and say: 'Here are the reassurances you have, with the regulator's stamp of approval, that this data will be protected to the regulated standard from end to end. There is a perception in the industry that some of these problems will not be tackled unilaterally.'"

Chappelle said collective action could potentially include providing transparency about who is handling a subject's data and how. Travel Tech is talking to the International Air Transport Association about an industry standard for conveying necessary information on air tickets, including which GDS and other data controllers are involved and providing links to those controllers' privacy notices.

A code of conduct also should address the complex interplay between data processors and data controllers. "The data controller has more responsibility because it determines the how and the why and is also responsible for the process," said the data expert who requested anonymity. A processor, on the other hand, carries out the data processing specified by the controller.

many from the travel industry, have signed up to the framework, which commits them to various obligations for processing personal data and guaranteeing individual rights.

Days after giving the green light to continue, European Commissioner for Justice, Consumers and Gender Equality Vera Jourova expressed her unhappiness that U.S. President Donald Trump has not appointed an ombudsperson to handle complaints from EU citizens who believe their rights have been violated. The ombudsman is a requirement of the agreement. Jourova also worries about lack of compliance checks for those companies signed up to Privacy Shield, about a move by Trump to increase sharing of data by the National Security Agency without court oversight and about a potential enhancement of foreign intelligence gathering powers for the NSA.

Both the court ruling on standard contractual clauses and doubts about Privacy Shield have “the potential to derail travel,” said Kasey Chappelle, chief privacy officer for

American Express Global Business Travel. “Many people were surprised by the earlier decision invalidating Safe Harbor, which caused massive churn as companies reevaluated their transfer mechanisms. If the European Court of Justice were to invalidate the EU model clauses, as well, it would leave no easy recourse for the thousands of vendors who support the travel industry from abroad and the EU-based companies who rely on them.”

She continued: “It’s telling that Privacy Shield survived this first review even under the current U.S. regime. But having a yearly review brings in some troubling uncertainty that was raised at the time the agreement was signed. Companies who rely on it should definitely have a backup plan.”

One other available transfer mechanism, which Amex GBT uses, is Binding Corporate Rules, which govern how multinational corporations transfer their data internally from their entities within the European Economic Area—the EU plus a handful of other countries—to those outside. Binding Corporate Rules require participating companies to produce evidence to one of the EU’s data protection authorities that they provide necessary oversights, staff training on data handling and numerous other protections. Binding Corporate Rules are strongly encouraged in the General Data Protection Regulation, which takes effect in the European Union in May 2018.

Chappelle called Binding Corporate Rules “the only mechanism still on solid ground.” ■

Anvil Enables Travel Risk-Based Trip Approval

Anvil’s travel risk management system now gives travel programs the option to approve, reject or request changes to itineraries that take travelers to dangerous destinations. The approval process occurs post-booking.

Anvil receives passenger name records via direct data feeds from all the major global distribution operators, then cross-references those bookings against its destination risk ratings, which clients can adjust to suit their businesses. Trips to lower-risk areas proceed through the approval process automatically. The system prompts designated managers to approve trips to high-risk areas.

If the manager approves a high-risk-destination trip, the system enables template responses to continue the conversation. The system could link travelers to travel precautions hosted on their employers’ intranet, for example, or could direct a traveler to a pre-trip training course.

Why Post-Booking?

“Pre-booking authorization is notoriously painful for the traveler and laborious for the travel manager,” the spokesperson told BTN. Anvil weighed the amount of traveler and manager time absorbed by a pre-booking system versus the cost of canceled flights that comes with a post-booking system and deemed post-booking approval as best for the bottom line. “There is a chance they’ll incur some cancellation costs, but we’ve had clients do cost studies on this to demonstrate the benefit.”

—Amanda Metcalf

One of the challenges for corporate travel is that multiple data controllers are often involved. There also are “a lot of supporting data processors that could be supporting any one of those controllers,” said Chappelle. “We can provide assurances the data will be protected when we are the ones controlling the process.”

Yet, it’s harder to assert control over others’ processes. “Think about the point at which the data handoff is made to a hotel,” she said. “The hotel is going to make decisions about how it stores and uses that data and the vendors that it uses to process the data. We can’t tell the hotel not to use those vendors or not to treat the data in a certain way. We can’t negotiate a contract like that with every hotel in the world.”

Protection of hotel reservation, payment and guest data has been pertinent this year. GDPR places stronger emphasis than earlier legislation on prompt identification, notification and remediation of breach incidents. “Events have shown a lack of clarity about who was responsible for those breaches,” said Chappelle.

Establishing a code is the first challenge, but putting it into practice raises other issues. What if some key companies don’t sign up? Even if they did, how would the code be monitored and enforced and by whom?

One travel trade association less enthusiastic about a code of conduct is the Hotel Electronic Distribution Network Association. Its members are skeptical of GDPR itself, and HEDNA’s preparations for the regulation have been limited to educating members and exchanging views with other industry bodies, according to board member Mike Carlo. “Accommodation is further behind than other parts of the industry,” he said. “The ownership structure means that imposing a protocol across different properties in the same brand is challenging.” In any case, he added, “most hotels outside Europe are perhaps a little annoyed that the EU is overreaching to businesses outside its jurisdiction. I’ve not heard anyone say GDPR is going to solve any of their problems.” ■

Hainan’s NY-China Service

Last month, Hainan Airlines began direct service between New York and two of China’s secondary cities, Chengdu and Chongqing, as part of its expanding U.S. network. The carrier, which began U.S. operations in 2008 with a Beijing-to-Seattle route, has grown to 10 routes connecting China to seven U.S. destinations, said Liang Pubin, Hainan North America general manager. The new routes from New York’s John F. Kennedy International each will run twice weekly.

“The China economy has been growing fast for the past years,” Liang said. That, combined with general economic growth, “creates the demand for those cities and also potential growth for international connections.” Corporate travel makes up 20 percent of Hainan’s business, but corporate revenue has grown “steadily” since it began the U.S. routes in 2008, he said.

Unlike the largest Chinese airlines—Air China, China Eastern and China Southern—Hainan is not a part of any of the major alliances, though it does partner with several U.S. carriers. Alaska Airlines is its closest partner, via mileage plan reciprocity, but Hainan also code-shares with American Airlines and offers ticketing and baggage connection with JetBlue via Boston, Liang said. Hainan remains “open for opportunities” with the global alliances, he said.

—Michael B. Baker



How the New Traxo Filter Captures Off-Channel Bookings

BY AMANDA METCALF

In the industry's quest to capture off-channel bookings, itinerary management software company Traxo has combined its existing data aggregation and email parsing skills with a new way to access corporate clients' emails. It's called Traxo Filter and went on the market on Nov. 1.

There's no email forwarding by travelers or the need to enter loyalty credentials; you'll never capture all the bookings that way, CEO Andres Fabris said. There are no direct connections with suppliers; the task of setting up partnerships with every supplier would be never ending. Nor does Traxo's process require it to access corporates' email systems. So how does Traxo do it?

Traxo sends clients a kind of starter kit: a license, some rules—"not even code"—and a two-page how-to that directs an IT administrator where in the mail server to drop those email server rules. Once that's done—it can take 20 minutes, Fabris claimed—the mail server monitors for messages arriving from Traxo's database of supplier email addresses that send confirmation emails. He said that list covers 90 percent of suppliers, and subscribers will receive software updates with more senders as Traxo builds its list.

As booking-confirmation emails come in, the email server automatically blind copies those messages to a unique Traxo email address set up for each client. From there, the same tech Traxo has used for eight years to organize travel itineraries then digests HTML, text and PDF content, including changes, cancellations and refunds. "It's luckily something else that we



Traxo's Expansion Plans

CEO Andres Fabris told BTN Traxo's itinerary management platform and new tech work across 38 languages, though sales and marketing have centered on North America. The company will make a Europe push in 2018 and an Asia/Pacific push in 2019, and it has started to put people on the ground in those markets.

didn't have to go off and build just given our DNA growing up as an itinerary management tool," Fabris said.

Then Traxo Filter adds the data to the Traxo Connect dashboard, part of the software provider's existing platform. Traxo Connect still can take information from bookings that employees forward or from supplier direct connections. Traxo Filter can either supplement or replace those data feeds. Via the dashboard, travel managers can see real-time spend, as well as traveler whereabouts. Fabris noted that non-technical types can handle the data, which can be viewed in list or map form and filtered by traveler, date and location. The system also monitors flight statuses. Travel managers can report on the information they find in the dashboard, download it and share it with service providers like re-shopping tools, risk management systems, expense reporting systems and business intelligence tools.

"The other folks that we've seen trying to solve this problem [without requiring action by the traveler, such as forwarding booking confirmations] are doing analytics and reporting and leakage analysis

Bob Brindley Moves to Startup TripActions



TRIPACTIONS VP OF SUPPLIER RELATIONS & ALLIANCES
BOB BRINDLEY

Twenty-one year BCD Travel/Advito executive Bob Brindley has left the mega travel management company and consultancy to join artificial intelligence-driven travel app provider TripActions. He will broker supply-side relationships for the startup, both with content partners and product licensing with agency partners. BTN editor-in-chief Elizabeth West caught up with him.

Moving from a mega TMC and consultancy to a tech startup is major. What prompted the move?

I wasn't looking to make a move, but the TripActions product tracks with major trends in the marketplace, and it was a unique opportunity for me to be a difference maker.

What trends specifically?

I saw the small and midmarket being underserved. The big TMCs don't have the product to serve them and don't want to, while the regional TMCs lack the resources to do a good job with them. So there's a significant segment of the market not getting what they need in terms of managing business travel. That's the segment TripActions is going after. Also, traveler engagement is increasingly important. Travelers require better communication with their travel departments, and

companies that can achieve this get better control. Building on that engagement [and using] traveler incentives as a way to drive savings and compliance bridge the long-standing disconnect between corporate and traveler objectives that creates a number of inefficiencies and lowers traveler satisfaction. Outdated policies and technology can't keep up with these kinds of market dynamics, but TripActions is offering an end-to-end solution that touches all of this.

Why aren't TMCs doing it?

They want to, but the large managed programs can be incredibly complex. Given the technology they have to work with—both the GDS technology and their internal technologies—they can do it, but it takes them longer.

Can TripActions handle large, complex programs?

We are not going after \$200 million accounts right now. When we do have to cross that bridge, we'll have better tech to do that.

Tell me how you see that journey playing out.

While we are looking at an entry point at the small and midmarket, the product can serve the needs of larger clients. We have already seen small and mid-sized clients grow rapidly. Last year, [our average client maybe had] \$1 million in managed travel. This year, that goes to \$4 million, next year \$10 million and the year after, it could be \$20 million. Four of our clients have market [capitalizations] of over a billion dollars. While their travel is small today, it won't be small forever. We will grow with them.

based on data that comes out of expense reports or the general ledger,” Fabris said. “And in both of those cases, it’s 60 days old. It’s after the fact; it’s already been purchased, traveled, spent. It’s just kind of interesting information, rather than actionable insights.”

Traxo Filter works with Microsoft Exchange, Outlook 365 and Gmail-based systems, which cover the critical mass of corporate email accounts. If a client uses a different email system, Traxo will add it, he said.

Traxo is selling Traxo Filter to corporates for \$1,000 plus \$1 per transaction or for \$5,000 a month plus \$0.50 per transaction. Fabris said, though, that Traxo will focus on reselling relationships with travel management companies.

What Else Is Coming to Traxo Filter

What travel managers do with the data in real time is up to them. Travel managers could re-shop bookings, try to convert them to corporate negotiated rates or even reward travelers for bookings that save money, Fabris suggested. “We take an agnostic view. We just say, ‘The corporate travel manager ought to know,’ and we leave it at that.”

Traxo does plan, however, to add tools to make it easier for travel managers to move data to suppliers. The company has 20 partnerships in place with duty of care providers like Anvil and iJet, expense providers like Chrome River and Coupa and business intelligence tools like DVI. “We’re going to continue to build that out,” he said, alluding to a marketplace of suppliers that could access Traxo’s data at the behest of common clients, encompassing such additional categories as value-added-tax reclamation providers.

Traxo Filter’s road map also includes benchmarking that will help travel managers see at a glance whether an off-channel booking performed well against the corporation’s negotiated rates. Those shaded in red, for example, might be X percent over the benchmark for that destination on that date. Travel managers could use that information, for example, to discuss the anomaly with the traveler, to try to apply a corporate negotiated rate or to re-shop the booking. Thus, re-shopping tools

Traxo’s Previous Attempts to Produce Comprehensive, Real-Time Trip Data

Without mentioning Concur TripLink by name, Traxo CEO Andres Fabris noted, “There’s a solution on the market that attempts to get you real-time insight into the data by integrating with suppliers.” Of Traxo’s journey to providing full and timely information about a company’s travel spend and traveler whereabouts, he added, “We started going down that path.”

To that end, Traxo created connections with suppliers like United, Lufthansa and Booking.com, but the process was dragging. “We’re like, ‘These things are taking a long time.’ We thought the critical aspect of a solution like this is that it has to be comprehensive. It has to give you nearly all suppliers. Otherwise, you end up managing multiple systems and you haven’t really solved the problem.” Fabris estimated that “nearly all suppliers” add up to 200 or 300. Even if Traxo set up a direct connection with a different supplier every month, “that’s 200 to 300 months of integrations,” he said.

There’s another approach Traxo tried: gaining permission to access corporate clients’ email systems. After testing and trying to sell corporations on the payoffs of collecting comprehensive data, Fabris said, the company realized “it was just a nonstarter from a data security perspective.” He explained, “A company is not going to let a third party come in through their corporate firewall, read all of their emails and promise to only send themselves ... the travel-related emails.”

also are among the third-party partnership integrations Traxo is establishing.

“We’ll specialize in all of the data and then leave all these additional little services to the folks that provide those services today,” Fabris said. “We’ll provide some light-visualization tools, but if they want to take it to the nth degree and render this within a Domo or a Tableau, we’ll have these little connectors that push the data out to those various companies.” ■

How are supplier partners responding to the opportunities?

Part of my role will be looking at direct connect with hotels and car rentals and airline companies that could add another layer of content. And we are looking at other content providers in the marketplace, as well. There’s a lot of work to be done. The suppliers we’ve talked to have been very interested. They’ve seen our accelerated growth: In the first quarter this year, total clients on board had \$20 million in travel budget under management. By the end of the year, it will be \$120 million, and by the end of next year, it will be \$500 million. Those are huge numbers for two-year growth, and the plan is to continue.

What about agencies that want to get on the AI train?

We have partnership opportunities with agencies. They might license the product to sell to clients or use it [internally]. Some of that larger market opportunity could be covered by alliances and partnerships, as well.

TripActions is already a hybrid-type product and service. It

has agents and offers human intervention for clients, correct?

The company started as a technology company, taking advantage of the latest technology available to build a better platform and program. They realized right away, however, that they needed to be a TMC. We use AI to be proactive and identify [travel] problems and take action to reaccommodate travelers or call hotels about a late arrival. We want to be able to do that before the traveler knows they need it. If necessary, travelers can key into TripActions agents through call or chat or a videoconference. There’s a huge service component.

AI-powered travel concierge products are forming a fairly crowded market. You’re competing against Mezi, 30SecondsToFly, HelloGbye, Pana, Lola and plenty of others. What makes TripActions different?

All those are potential competitors, but they are looking at one [element] of the industry. TripActions has pulled it all together with an end-to-end solution. It’s not just policy and artificial intelligence; it’s not just an incentive like Rockettrip that overlays an existing program. It’s truly end to end. ■

TripActions Pulls In Content from Expedia & Priceline Subsidiaries

Customers of corporate travel booking tool TripActions now can access inventory from Expedia and its subsidiary Hotels.com, as well as Priceline subsidiaries Agoda and Booking.com. TripActions already brings in content from Sabre and a limited Priceline inventory, according to TripActions founder and CEO Ariel Cohen. More than half of TripActions bookings come from the consumer booking tool selections, he added. In April, the startup completed its series A financing with \$12.5 million. Lightspeed Venture Partners led that funding and Zeev Ventures also participated. TripActions has used the funds to expand its team to support new and current customers, Cohen said.

—JoAnn DeLuna



Chrome River Pilots Travel ROI Tool

BY JOANN DELUNA

Chrome River has partnered with Salesforce to create Prosper, a tool that combines expense and customer relationship management data to give clients new expense functionality and insight into business travel ROI. Chrome River is piloting the tool, which Chrome River product manager Alex Kim claims is the first of its kind. The company plans to make Prosper available to clients by the end of the year. Chrome River also plans to partner with other CRM tools beyond Salesforce.

Supporting Corporate Travel Decision-Making

Prosper will give finance and sales managers access to map-based dashboards that identify customers' locations. Clicking a single customer reveals three things associated with that customer: sales opportunities, business travel expenses and revenue. Combining the three will offer a snapshot of how well corporate hospitality has supported sales conversion efforts. A toggle option shows spend on that customer in one-, three- and six-month intervals. A year-to-date view is in the works.

The idea, according to Chrome River, is to be able to look at this combined data to support business travel decision-making, whether it's a decision to take a trip or not or how to structure the trip budget. The map-based interface also shows whether there are other clients in the area that the traveler could visit to maximize the trip, Kim explained.

Bi-Directional Data Flow Improves Expense Reporting & Cuts CRM Steps

Chrome River's integration with Salesforce offers some convenient new expense reporting features, particularly for sales executives. For example, when users are asked during the expense process to identify meal attendees, the Guest Picker feature automatically suggests clients from the Salesforce database. A user can enter company, title or first or last name to get suggestions and click to add as a guest for that meal. "In the past, users were digging through business cards or searching through emails to get the right information," Kim said. "Plus, [the company was] leaving it up to the user to type everything correctly."

Similarly, Chrome River now features the CRM Allocation Picker, which allows users to select a

general ledger allocation and select a particular product, project or other sales opportunity associated with the trip, eliminating the need to do it later in Salesforce. If a traveler visits multiple clients on one trip, Chrome River splits the cost of expenses evenly between clients, but the user can adjust the allocation manually.

Attributing the correct amounts here is critical to determining the total spend for each client that's visible in Prosper. Kim said this would not create more work for travelers because they otherwise would have to enter these details in the CRM system.

What's Next

Chrome River is working on further functionality as it pilots the tool, including the ability to view spend by team and account, as well as a predictive tool that shows spend estimates into the future. Over time, Prosper could reveal patterns in types of clients or types of opportunities that respond well to face-to-face meetings as opposed to those that don't. It also may reveal teams that are skilled in leveraging travel as a sales tool and those that are not and give insight into how corporate travel budgets should be allocated overall. ■

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The closer you look, you'll see that we mean business.

For more information:

www.ChoiceHotels.com



Citigroup

Citi®, the leading global bank, has approximately 200 million customer accounts and does business in more than 160 countries and jurisdictions. Citi provides consumers, corporations, governments and institutions with a broad range of financial products and services, including consumer banking and credit, corporate and investment banking, securities brokerage, transaction services, and wealth management.

Citi® Commercial Cards, with proprietary issuance capabilities in 100 countries, including local-currency programs in 64 countries, has long been considered a leading commercial card provider to large and multinational organisations globally. Citi Commercial Cards' products form the core of the expense management strategies for nearly 500 multinational corporations, making Citi a premier card issuer in terms of technology, innovation and volume. For more information regarding any of Citi's innovative global solutions, please visit:

www.citicommercialcards.com



CSI globalVCard Travel

Since 1989, CSI Enterprises, Inc. (CSI) has provided innovative solutions to world leading brands. Combining technology and extraordinary customer service, the company's highly secure 'globalVCard travel' solution is a no-cost corporate travel solution combining our virtual card system, mobile payment app, and purchasing card to provide your business with powerful spending control and automated processes, globalVCard Travel makes it easy for your travelers to follow the rules.

Control & Compliance: Direct payments made for employees and guest travel.

Automated Reconciliation: One card per transaction, robust reporting.

Fraud Reduction: Single-use virtual card eliminates risk of stored card data

Mobile Convenience: Reservation data and payment available to traveler.

Direct Bill Elimination: Automated faxing or email of credit card authorization form.

Travel Management Company Integration: API integration with booking tool.

www.csiglobalvcard.com/corporate-travel



Cvent

The corporate landscape continues to provide new challenges as companies expand globally and new regulations are imposed. More than ever before, travel and meetings managers are working together towards common goals such as duty of care, cost-savings, compliance, the human experience, operational efficiency and visibility. Success in these areas can be optimized when Travel and Meetings work hand in hand.

Enter Cvent, a leading cloud-based enterprise event management company, with approximately 16,000 customers and 2,000 employees worldwide. Cvent offers software solutions to meeting and event planners for online event registration, venue sourcing, event management, mobile apps for events, e-mail marketing and attendance tracking. Cvent solutions optimize the entire event management value chain and have enabled clients around the world to manage hundreds of thousands of meetings and events.

www.cvent.com



Deem

The most difficult part of any business trip is too often the trip itself. It shouldn't be. Deem makes it painless for the traveler to get down to business without distraction, simpler for the travel manager and management company to keep track of all the moving parts, and easier for partners to get the information they need to stay competitive.

The Deem Work Fource platform is designed for the entire business travel ecosystem using machine learning, AI and predictive analytics. Deem's suite of tools range from a dynamic traveler booking platform, travel manager cost controls, travel agency service technology, and supplier revenue opportunities, including the world's largest car service affiliate network and operator solutions.

Deem's Work Fource Platform services more than 50,000 corporate customers in 61 countries, speaking 15+ languages - including the world's largest travel management companies. The company, headquartered in San Francisco, CA, with offices in Bangalore, India, is backed by leading venture capital funds, as well as corporate and private equity investors.

www.deem.com



Delta Air Lines

Shaping Tomorrow's Business Travel, Today.

Leadership isn't a destination, it's a mindset. One that courageously sets its course for uncharted territory. At Delta, we are always in pursuit of new ideas to better serve you, your travelers and your company. Like adding even more benefits to Delta Edge™, our beyond-contract suite of services.

Innovative Products Are Enhancing Self Service

Delta Edge Wallet, the newest addition to Delta Professional, enables you to easily manage Complimentary Tickets, Upgrade Certificates and Drink Vouchers. See it inside the newly enhanced Delta Professional portal.

Superior Operations In Every Region

You asked for it. We created it. Our new Regionalized Operational Excellence Reporting enables you to compare Delta's operational performance on routes that matter most to your company.

Elevating The Onboard Experience

Your travelers should feel how much they are valued by Delta at every point in their journey. Our new Onboard Recognition program empowers flight attendants to ensure your travelers know exactly how much we value them, especially at 35,000 feet.

www.pro.delta.com



Dinova

Dinova, Inc. is the only company providing an innovative, proprietary marketplace exclusively focused on connecting expense account diners to quality restaurants nationwide. As the B2B marketing channel for restaurants, Dinova delivers a focused resource of catering, private dining, meeting and other business meal options for employees on expense accounts. Through a seamless backend process, Dinova helps companies save on their third-largest T&E category, meals & entertainment, while simultaneously offering company employees an easy, real-time way to discover the right restaurants for all their business needs.

Participating companies in Dinova's marketplace range from more than a million small to medium sized businesses to hundreds of Fortune 500 enterprises, and its 14,000+ restaurant network includes local independents as well as national full-service and limited-service restaurant brands, encompassing all price levels and cuisines.

www.dinova.com/businesses



Egencia

Launched in 2002 as Expedia Corporate Travel, Egencia has become the fourth largest travel management company in the world as a result of its commitment to delivering a higher standard of corporate travel service and innovative technology. Egencia's success is directly attributed to their customers' ability to move their businesses ahead, through their valued relationships with Egencia and more importantly, its people. Lead by an experienced, forward-thinking management team, Egencia has continued to expand its offering of intuitive online tools and comprehensive agency services, while maintaining its reputation for superior customer service. With global operations already spanning 39 countries worldwide, Egencia is ready to meet your company's travel needs anywhere and at any time, with the consistent level of superior service your employees deserve. For more information, please visit www.egencia.com or follow us on Twitter @Egencia.

www.egencia.com



EmpireCLS Worldwide Chauffered Services

EmpireCLS Worldwide Chauffered Services is the travel industry's recognized leader in luxury ground transportation. Our journey began in 1981 as a small limousine company in New Jersey, with a handful of vehicles and a vision to create memorable experiences for clients through exceptional customer service, and upholding safety and discretion.

Today, EmpireCLS maintains the largest privately held fleet on both coasts and provides chauffeured transportation across six continents. Clients include many of the world's top CEOs, dignitaries, executives and Hollywood elite who rely on us for their corporate and leisure ground transportation needs.

Our comprehensive services are utilized by:

- Travel agencies and Corporate Travel Managers
- Five-star hotel partners
- Meetings and events, touring, and road show managers
- Travelers in need of security-detailed transportation

Clients relax in the comfort of our late-model fleet, featuring vehicles designed by brands that understand luxury, and driven by professional chauffeurs trained in delivering the "Wow!" We may have grown in size and capabilities over 35 years, but our dedication to service remains at the core of our business and is our number one priority. It's why we like to say your arrival is more than just a destination: It's our signature.

www.empirecls.com



Enterprise Holdings

Three great brands delivering more flexibility, locations and rewards.

Three of the finest names in car rental—Enterprise®, National® and Alamo®—have formed an industry-first network to provide their customers with superior service and rewards worldwide. If you travel to a destination where you can't rent with your preferred brand, you have the option to rent from any one of the 9,600 fully staffed neighborhood and airport offices in more than 90 countries and territories. What's more, Enterprise and National loyalty club members can earn toward free rental days and elite status with qualifying rentals from either member. Enjoy a more rewarding rental experience in more places with Enterprise Holdings.

www.enterprise.com



Extended Stay America

Extended Stay America, Inc. ("ESA") is the largest integrated hotel owner/operator in North America. Its subsidiary, ESH Hospitality, Inc. ("ESH"), is the largest lodging REIT in North America by unit and room count, with more than 629 hotels and approximately 70,000 rooms in the United States. ESA manages all of ESH's hotel properties, providing over 8,000 jobs at hotel properties and corporate headquarters. Extended Stay America® is the leading brand in the mid-priced extended stay segment, with approximately twice as many rooms as its nearest competitor.

www.extendedstayamerica.com/about/business-travel.html



innovate

For the advancement of business travel

Fairfly

FairFly maximizes your airfare savings by tracking flights globally across multiple GDSs, post-booking and up until departure.

Companies using FairFly can unlock savings of up to 4% of their spend on identical flights alone, and double the amount on similar flights.

FairFly's proprietary algorithms drive automation at scale and search for identical, similar, and even better flight options while factoring in applicable airline penalties, private fares, and corporate travel policies. With FairFly's fully customizable search filters, Corporate Travel Managers can tailor the search to accommodate the needs of specific groups of travelers, or even a specific traveler.

Launched in August 2016, FairFly was awarded 1st Place at the 2017 Business Travel Show Disrupt Awards. For more information:

www.fairfly.com



FCM Travel Solutions

FCM Travel Solutions is the flagship global travel management brand of the Flight Centre Travel Group which has expanded to become one of the world's largest travel companies. FCM is the business travel partner of choice for large national, multinational and global corporations and our global network spans more than 90 countries, employing over 6000 people.

We are transforming the business of travel through our empowered and accountable people who deliver 24/7 service and are available either online or offline. Leveraging FCM's negotiating strength and supplier relationships in conjunction with our tailored business travel programs, our expertise delivers more for our clients where it matters most to them.

For six consecutive years we have been recognized as the World's Leading Travel Management Company at the esteemed World Travel Awards (2016, 2015, 2014, 2013, 2012, 2011).

www.us.fcm.travel



Groundlink

GroundLink is a pioneer in developing leading mobile technology and software solutions for the ground transportation industry. In addition to being technology focused, GroundLink is a best-in-class, global black car service. The brand excels at combining customer-centric technology and high-touch 24/7 customer service to deliver a safe, reliable and professional ride at an affordable price. Through a vast network of carefully vetted independent operators and affiliates, GroundLink provides rides to both business and leisure travelers in more than 300 cities around the world. GroundLink offers multiple booking platforms for its consumer and corporate clients that include its website, iPhone or Android app, and 24/7 Customer Service Center. GroundLink has offices in North America and Europe, with its headquarters in New York, NY.

www.groundlink.com



Hertz

Your travelers deserve the benefits of Hertz.

Exciting things are happening at Hertz, and your travelers will benefit.

Hertz Gold Plus Rewards®

For the sixth year in a row, Gold Plus Rewards has been voted the Best Rewards Program in the Drive category by FlyerTalk. Members receive special perks and benefits that make travel easier and more rewarding, such as: Earning points toward free rental days, skipping the counter and going straight to their car, receiving bonus points, upgrades and more when they achieve elite status.

Introducing Hertz Ultimate Choice®

With Ultimate Choice*, your travelers can choose the vehicle that's right for them and get on their way faster. The car they choose is the car they drive. It's that simple.

- 1) Reserve a car: Travelers book as they normally would. A confirmation email tells them if the reservation is at an Ultimate Choice location.
- 2) Choose a car: Gold, Five Star or President's Circle members booking Midsize cars or higher can skip the counter and go directly to the zone with their Gold Member status.
- 3) Proceed to the exit gate.

With a substantial global footprint covering airport and off-airport rental needs, it's no wonder Hertz is a trusted brand among travelers everywhere they go.

www.hertz.com



Hilton

Conrad Hilton began with a 40-room hotel in a small Texas town in 1919. Today, Hilton brings the light of warmth and hospitality to more than 5,000 hotels across 103 countries. With 14 distinct brands that meet the needs of every traveler, from business to leisure, luxury to family-friendly, we delight our guests and reward our partners. How? Through best-in-class service and programs, including:

- Hilton Honors, our award-winning hotel rewards program. Think free Wi-Fi for members, Digital Check-In and Digital Key where attendees can check in, select their room and be on their way, bypassing the front desk and saving valuable time;
- New brands for today's savvy business traveler, including Curio Collection by Hilton, Tapestry by Hilton and Tru by Hilton; and
- Travel with Purpose, where we harness our global hospitality mission to strengthen communities and protect the environment for the greater good.

For nearly 100 years, one name has stood for hospitality: Hilton

www.hilton.com



HRS Global Hotel Solutions

HRS offers end-to-end hotel management solutions to more than 3,000 businesses globally. As well as providing professional hotel procurement services and negotiating special rates with hotels, HRS optimizes the cashless and paperless payment of hotel stays, whilst offering automated invoice processing. In addition, HRS provides solutions for meeting and group bookings through a standardized online booking tool which completes the offer for companies.

HRS opened its U.S. operations in Manhattan in 2015 and has grown to 25 employees across North America today. Globally, HRS grew its staff by 15 percent in 2015, today employing 1,600 employees in 26 offices around the world, with Mumbai and Sydney representing the latest additions. HRS features 300,000 hotels in the global portfolio, including 180,000 independent hotels with no affiliation to a chain. With five million rooms in the global distribution systems (GDS), HRS is the largest hotel content provider in these systems. Numerous global companies in the Fortune 500 are among HRS' corporate clients – including Google, NEC, Siemens, Mondelez, China Mobile, Hitachi, and Alibaba.

www.corporate.hrs.com





For the advancement of business travel

InterContinental Hotels Group

IHG's family of hotel brands has a powerful heritage that guests know and love, with hotels that are instantly recognized by millions around the world. From the first Bass brewery in 1777 to one of the world's leading hospitality companies, IHG's history is one of pioneering people and new ideas, built on a foundation of consistency, trust, innovation, caring and resolve. In April 2003, InterContinental Hotels Group (IHG) was officially formed following Six Continents PLC's separation of the group's hotels and soft drinks businesses from the retail business (named Mitchells & Butlers plc). Over the last decade, IHG has worked relentlessly to build its brand with talented people and delivery systems to ensure responsible business practices. In 2016, IHG has over 5,000 hotels in nearly 100 countries around the world. IHG's goal is to create Great Hotels Guests Love; its brands are in 13 of the 20 largest hotel markets with more guest rooms than any other hotel company in the world.

www.ihg.com



Korean Air

Korean Air offers a unique brand of spaciousness and comfort. With a fleet of new A380s, B747-8's and B777s, the airline brings a fresh level of ease and enjoyment to business travelers.

Passengers traveling in one of the airline's new First Class or Business Class suites are guaranteed a journey that will pamper them inflight and deliver them to their destination relaxed and ready.

The airline's entertainment system features your own personal cinema in the sky. Play games, listen to music, or watch hundreds of Hollywood and International hits and classics on the high definition entertainment system with touch screen remote.

Hungry? You're in luck, because all Korean Air flights feature an array of award-winning, world-class and delicious Western, Korean, Chinese and Japanese cuisine with premium wine and Champagne pairings, much of it organic and sourced from our own ranch on Korea's Jeju Island.

As the largest transpacific airline, Korean Air offers convenient travel to all major Asian business centers and serves 124 cities in 43 countries on six continents, with non-stop flights from 12 North American gateways to Seoul and beyond. For your next trip across the Pacific, indulge yourself with the best! We're confident you'll be impressed with Korean Air.

www.koreanair.com



Loews Hotels

A Heritage of Hospitality. A Future of Excellence

Loews Hotels & Resorts has been welcoming guests for over six decades. Today, our distinctive luxury hotels and resorts continue to offer guests the ultimate in upscale travel experiences throughout the United States and Canada.

How It All Began. It's safe to say that hospitality is in the Tisch family's DNA. In 1946, brothers Larry and Bob Tisch purchased their first property known as Laurel-in-the-Pines, in the New Jersey woodlands. Today, this innovative company has the next generation at its helm in Jonathan, Andrew and James and is a premier name among luxury hotel brands. The lessons learned from their visionary patriarchs about value, service and commitment still run through everything we do

Where We're Going. While the Loews Hotels & Resorts history is rich, we have an eye on tomorrow—and that means understanding today's traveler. We understand that our team runs the hotel but our guests run the show. Each of our properties is unique, but the one thing that never wavers is a warm, welcoming atmosphere where business travelers, families and, yes, even your four-legged friends feel right at home.

www.loewshotels.com



Lyft

At Lyft, we believe that ride by ride, we're changing the way our world works. We imagine a world where cities feel small again. Where transportation and tech bring people together, instead of apart.

With Lyft Business we are helping organizations provide safe, affordable, and convenient rides for the people they care about. Lyft Business offers travel, commute, event, and courtesy ride programs that provide customers with the tools they need to reduce cost, save time, and streamline their transportation programs. We partner with thousands of small, medium and enterprise organizations to create unique solutions to move their people, from employees and customers to patients and students. For more information on how you can harness the power of Lyft's nationwide network of drivers and transportation management tools, please visit:

www.lyft.com/business



Marriott International

At Marriott International, our 30 brands are differentiated by design, signature programming and personalized service. From the utmost in Luxury to the efficiency and value of Select Service, we offer every traveler and travel professional the right brand, in the right place, at the right price. With more than 6,200 properties spanning 125 countries and territories, we cover more of the world than any other lodging company. As new destinations emerge, we will be there.

www.marriott.com



Mastercard

Mastercard® is a technology company in the global payments industry. We operate the world's fastest payments processing network, connecting businesses, consumers, financial institutions, merchants, and governments in more than 210 countries and territories. Mastercard products and solutions help make everyday commerce activities – such as traveling, running a business and managing finances – easier, more secure and more efficient for everyone. Mastercard is accepted at almost 43 million merchant locations worldwide, ensuring that employees can rely on Mastercard wherever their travels may take them.

www.Mastercard.com





For the advancement of business travel

PredictX

PredictX provides actionable insights by applying innovative technologies like machine learning and advanced data fusion techniques to link, match and analyze internal and external data sources.

Within the Travel industry, PredictX helps companies to integrate bookings, card and expense payments with new data sources such as the sharing economy and direct booking feeds. PredictX then gives travel managers the tools they need to deliver advanced analysis and automated insights into their programs, transforming the value that they deliver to their businesses.

PredictX works with companies such as Barclays, UBS, Teva and Adidas to derive actionable intelligence and insight from the enormous repositories of information they hold.

www.predictx.com



Roadmap

Since winning BTN's Business Travel Innovator award in 2015 (both the judge's and people's choice), Roadmap has delivered "sexiness" to leading corporates. Brands like Microsoft and Philips recognize the value of engaging with their travelers to driver their travel experience and to generate cost savings for themselves (the corporate).

Roadmap works with corporates that have a "traveler centric" program to drive value in four key areas; safety, savings, productivity and (traveler) satisfaction. It's a constant development and release process, driving innovation. But in the end, our close collaboration with customers combined with Roadmap's humble, eager, smart and curious mind-set, creates fantastic feedback from the travelers.

Do you see the value of a "traveler centric program"? Then reach out to us to review if we can bring value to you, your team and your travelers. After all, don't you want to be the "sexy corporate" that drives value for all?

www.getroadmap.com



Sabre

Sabre is an innovative travel technology company that leads the industry by helping our customers succeed. We've designed solutions for travel managers, travelers and Corporate Travel Departments to operate an efficient, vigilant and traveler-friendly corporate travel program. Corporations need industrial-strength solutions with a consumer-grade experience so our powerful tools have the muscle to simplify complex travel sourcing, while also ensuring extraordinary savings. With our traveler-focused technology, our customers maximize the value of their travel spend – transforming business travel into business performance.

Learn about our new open and integrated product platform that is innovating the future of travel technology. This solution combines all aspects of travel into an award-winning mobile experience.

www.sabre.com/page/traveler-experience



Southwest Corporate Travel

Over 45 years ago, Southwest Airlines® started out as a regional carrier serving three cities in Texas. Today, we carry more passengers in the United States than any other airline and serve 98 total destinations in 41 states, the District of Columbia, Puerto Rico, and seven international countries. In addition to our everyday low fares, Southwest Airlines is the only airline to continue to provide no change fees, no cancellation fees, the ability to reuse unused funds in their entirety to the original traveler without a penalty and the only major U.S. airlines to offer bags fly free to everyone. Business travel friendly ticketing policies like these and more help raise the value to your travel program while lowering your company's bottom line; all without changing the things you've always counted on—safety, outstanding Customer Service, on time flights.

Whether managing a multi-million dollar business travel program for a Fortune 500 company or making purchasing decisions for a single office start-up, Southwest Airlines' suite of business travel products, services, and programs can help meet your business travel needs. Please contact Southwest Airlines to learn how to improve your bottom line.

www.southwest.com/corporatetravel



Travel and Transport

Founded in 1946, Travel and Transport, Inc. is one of the largest travel management companies in the U.S. specializing in corporate travel management, leisure/vacation travel, group/meeting travel services and most recently launching a separate big data company known as Data Visualization Intelligence, Inc. (DVI). Travel and Transport, a 100% employee-owned company, currently has over 1,600 employee-owners located in seven countries. We are recognized for unparalleled service, integrity and industry-leading technology solutions. Customers are partnering with Travel and Transport to consolidate and manage their travel programs, improve service levels, reduce operational costs, leverage their purchasing power and enable compliance.

Every day there are new technologies, expanded destinations, additional regulations and a barrage of new challenges in the travel industry. In order to navigate this evolving landscape successfully, Travel and Transport starts with a traveler-centric approach to creating solutions. By listening to our clients and understanding the needs of the ever-evolving traveler, we create solutions that bring true value and positive impact.

www.travelandtransport.com



Travelport Locomote

Travelport Locomote is a great story of corporate travel technology that was built with a global mind-set from the beginning.

Following three years of success in the Australian market, we enjoyed a soft launch in the UK in February of this year, with plans to launch in the US in 2018.

Selling Travelport's technology solution into the US is a natural next-step given the strength of Travelport in the country, combined with the significant interest from US-based companies over the past 18 months.

Our marketing content and global event appearances have generated many hundreds of enquiries from the US. We have nurtured this interest and look forward to meeting the unmet needs.

With partner activities in Malaysia and Singapore, and plans for South Africa and beyond, we are well-placed to achieve on our global mission to redefine corporate travel by enabling companies to manage every aspect of their business travel through smart, intuitive technology, designed for the way companies work today.

www.travelportlocomote.com



TripBam

There's an easier way to shop for better rates at hotels. TRIPBAM provides agencies and corporations with a way to lower client hotels costs, improve revenues for the agency through increased commissions, increase processing and touch fees, improve compliance to a negotiated hotel program and increase hotel attachment rates. Our solution shops hotel bookings daily to provide peace of mind to travelers and travel managers that the rate booked at a hotel is the lowest available rate – either at the same hotel or a nearby hotel at the same quality or better. As lower rates are found, notifications can be sent to the traveler for approval or automatically rebooked. We focus on strengthening corporations preferred hotel programs by auditing whether travelers are receiving the LRA rate at the hotel, highlighting properties that are offering weak rates relative to the market, and including preferred hotels in our cluster shopping experience. Additionally, we offer solutions to increase corporate programs hotel attachment rate.

www.tripbam.com



United Airlines

United Airlines and United Express operate more than 4,500 flights a day to 339 airports across five continents. United is proud to have the world's most comprehensive route network, including hubs in Chicago, Denver, Houston, Los Angeles, New York/Newark, San Francisco and Washington, D.C. The airline is a founding member of Star Alliance, which provides service to 192 countries via 28 member airlines.

Over the past 90 years, United has been at the forefront of many aviation and technology firsts, while making the world a smaller place for millions of people. United continually invests and innovates in the current and future need of business travelers. With our award winning app, inflight Wi-Fi on our entire fleet, complimentary personal device entertainment onboard and real time travel notifications, along with new international United Polaris Business Class, our travelers always remain connected and their travel experience elevated.

Innovation, self-service and “Easy To Do Business With” will take a new meaning in 2017 when we launch our next generation sales portal, designed specifically with our for corporate travel managers and agency partners in mind. Stay tuned!

www.united.com



Wheels Up

As the most intelligent private aviation solution for companies of any size, Wheels Up is a revolutionary membership based private aviation company that significantly reduces the upfront costs to fly privately, while providing unparalleled flexibility, service and safety. For a modest upfront fee and low annual dues thereafter, Wheels Up offers its individual and business members guaranteed access up to 365-days a year with as little as 24 hours' notice to a private fleet of over 75 aircraft that consists of the King Air 350i and Citation Excel/XLS.

With Wheels Up for Business, companies can optimize their travel budget without compromising safety, service or quality. And with no large upfront capital outlay for an asset, no recurring monthly management fees and no long-term commitment, your company can take to the sky knowing it made an intelligent investment with a trusted private aviation partner.

www.wheelsup.com



Wyndham Hotel Group

Wyndham Hotel Group leads the industry in economy and midscale lodging, making it possible for everyday travelers to have amazing travel experiences no matter what they can afford to spend on a trip. With more than 8,000 hotels in 79 countries, Wyndham's bench of 19 iconic hotel brands includes Days Inn®, Super 8®, Howard Johnson®, Travelodge®, Wingate by Wyndham®, Hawthorn Suites by Wyndham®, Microtel Inn & Suites by Wyndham®, Ramada®, Knights Inn®, Baymont Inn & Suites®, Wyndham Hotels and Resorts®, Wyndham Garden® Hotels, Wyndham Grand®, TRYP by Wyndham®, Dolce Hotels and Resorts®, Dazzler® Hotels, Esplendor® Boutique Hotels and The Trademark Hotel Collection®. Wyndham Hotel Group is no stranger to changing the game with guests in mind: the company's guest loyalty program, Wyndham Rewards®, offers more than 52 million members a generous points earning structure along with a flat, free night redemption rate — the first of its kind for a major rewards program — at more than 30,000 hotels, condos and homes globally.

www.wyndhamhotels.com



Yapta

Prices drop. We alert. You save. Yapta's award-winning corporate travel solutions, FareIQ and RoomIQ, enable companies to extend their T&E budgets, boost traveler compliance and attain essential program-specific data. Constantly tracking booked airfares and hotel rooms, Yapta sends instant alerts when prices drop. Launched in 2007, we pioneered the category of travel price assurance, and have delivered more than \$650 million in savings alerts to businesses and consumers. Yapta guarantees bottom-line savings.


www.yapta.com



Apps for Simple Meetings

Small meeting or simple meeting? Complexity rather than size has emerged as the more pressing issue as new meetings tools emerge to fill the gap between unmanaged, ad hoc meetings and more complex events. Each of the providers below offer a different approach through their technologies. Let's compare.

	Bizly	Meetago by HRS	Groupize
Meeting Size Sweet Spot	Most companies book programs of 100 attendees or less.	Targets up to 50 attendees strictly through tool; HRS meetings specialists support larger programs.	Focuses on simple meetings structure; number of attendees is less relevant.
Content & Market Coverage	Hotel meeting spaces, private dining spaces at restaurants and unique venues—all curated by Bizly—currently in 50 U.S. markets.	Global reach in 190 countries; 350,000 hotels in HRS system, including 150,000 with meeting space, aggregated across GDSs and other providers.	Global reach to 150,000 hotel properties via Travelport GDS.
Revenue Model	Variable subscription rates based on custom set ups; additional fee for Bizly Concierge support; Bizly earns commissions from some venues and offers a partial rebate of those commissions back to clients.	Revenue based on hotel commissions. Meetago tool is free unless the program goes above 50 percent net rate; above 50 percent net, it's \$35 fee per meeting.	Monthly subscription fees range from \$3,600 for up to 36 meetings annually to \$47,000 for unlimited meetings; corporates keep hotel commissions.
Content Priority	Clients can identify preferred venues within the existing Bizly inventory; Bizly will onboard clients' preferred venues and hotels to the system.	Supports preferred prioritization; can filter out non-preferred properties; HRS also can aggregate and expose additional content at client request.	Prioritizes and displays preferred hotels; can filter out nonpreferred properties.
Sourcing & Booking Types	Instant booking for last-minute meetings without sleeping rooms. Request-to-book puts organizers in direct contact with venue and offers shopping cart-style menu for selecting required meeting elements and booking sleeping rooms; average venue response time is two hours.	eRFP tool only; system defaults to four simultaneous bids in the market to encourage hotel response but can be configured to client preference; average RFP response rate is 75 percent.	Instant bookings for as many as nine rooms; RFP e-bids managed via email with menu-style selection for meeting elements; 80 percent of bids answered within 24 hours; new GDS rate code model enables instant bookings for large room blocks.
Mgmt. Tools	Bizly configures policy, preloads corporate addenda and facilitates approval routing; multiple user types; exports standard reporting; customized reporting available.	Policy configuration; rate loading support; integration with Amadeus Cytric; ERP integration; preloaded addenda per country/region; consolidated reports; KPI reporting.	Supports preloaded legal addenda and approval routing; multiple user types; at-a-glance dashboards; exports reporting; business intelligence tool launching in Q1 2018.
Unique Features	Human support offered through Bizly Concierge meetings specialists; artificial intelligence drives some RFP process reminders; only small meetings provider to offer private dining spaces and specialized event venues.	Supports 13 languages; virtual card integration; HRS meeting specialists drive cost-neutral RFP, payment and robust reconciliation support; payment control drives adoption.	Full tech stack includes registration tools and mobile event app; tight integration with Concur Travel facilitates seamless air bookings and reporting data; virtual card integration; "Event Pages" provide more client customization.

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