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HOT TOPICS



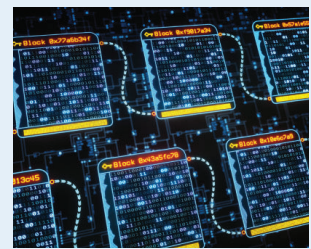
What do Alipay & Wechat Pay Mean for Corporate Payments?

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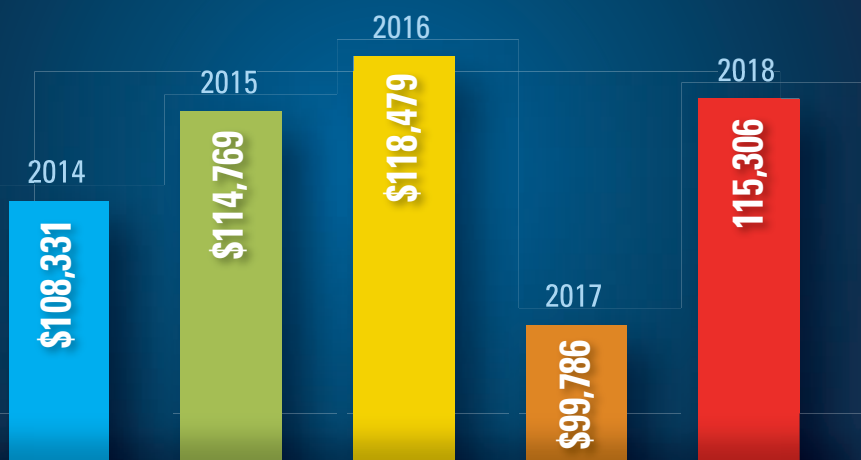
Blockchain's Early Travel Industry Movers

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TOP STORY

TRAVEL MANAGER SALARIES

(based on BTN's annual surveys)



BTN'S 35TH ANNUAL SALARY SURVEY & REPORT

2018 Salaries Spring Back

Travel manager salaries rebounded from last year's salary survey, marking 15.6 percent year-over-year growth, after last year's influx of early-career and small and midsize enterprise travel managers. Still, even among this year's respondents, salaries leapt 6 percent over their own salaries a year prior. This year's respondents also indicated changes in their programs' focuses, whether to meetings, traveler experience or technology. Keep reading to see how salaries break down by gender, job title, travel program size and experience, plus travel managers' perceptions about how their companies value them, where they expect their careers and salaries to go and where they see opportunities for career advancement.

FULL STORY ON PAGE 12

MANAGEMENT

Amex GBT CEO Talks Next Steps Now That HRG Deal Is Done

BY JAY BOEHMER

Two of the world's largest travel management companies have become one. American Express Global Business Travel completed its 410 million British pound takeover of Hogg Robinson Group last month to create a TMC that handles a combined \$36 billion in annual transaction value. The mega of all megas now has mega integration work ahead. "The real work starts now," Amex GBT CEO Doug Anderson said. "We've done a lot of planning, but planning is a desk-top exercise."

The new company named Amex GBT EVP of traveler care Joanna Macleod as chief transformation officer "to facilitate

the successful integration of the companies," according to Amex GBT. Meanwhile, HRG COO Bill Brindle joined Amex GBT's executive ranks as COO. Already announced, former HRG CEO David Radcliffe has joined Amex GBT's board.

"We'll be working hard on three primary objectives around bringing together our complementary global footprint, our highly complementary tech stack and then the best of both in regards to our people," said Anderson. "My principle around this from the beginning has been to find the best of both organizations and bring them

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David Holyoke on acceptance of Airbnb for Work



Eric Bailey on the upshot of Microsoft's Travel Manifesto

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Facial Recognition Hits the Hotel Space—Where Will It Lead?

BY JULIE SICKEL

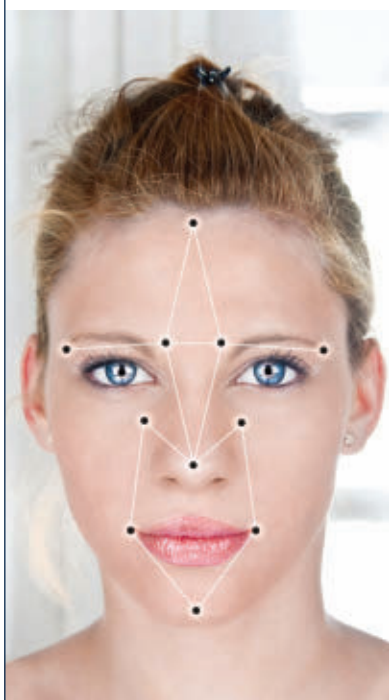
Marriott International is working with joint-venture partner Alibaba Group to pilot the use of facial recognition at check-in with Alibaba's travel services platform, Fliggy. The testing launched last month at two properties in China, the Hangzhou Marriott Hotel Qianjiang and the Sanya Marriott Hotel Dadonghai Bay.

Marriott aims to roll the technology out across all properties. Such an expansion—through the largest hotelier in the world working with one of the three largest online travel agencies in China—would provide the hotel industry a dramatic shove forward in adopting facial recognition.

Up to now, the airline industry has grabbed most of the press around facial recognition, as airports from Sydney to Senai have piloted or deployed it in some form or fashion. This year, U.S. Customs and Border Protection has been working with airlines—including Delta, JetBlue and Lufthansa—and airports to test the technology as a way to both enhance security and improve operational efficiencies.

Marriott's hope for facial recognition is similar: to improve operations. According to the company, check-in typically takes three minutes, most of that time spent waiting in line. The process being piloted has a hotel guest approach a self-serve machine, scan his or her ID, take a photo and input contact details. The system verifies the information and dispenses a room key card. That process, Marriott said, shrinks check-in time to less than a minute.

Marriott International is one of a number of hotel companies that already offers digital check-in and mobile room keys through its rewards app. However, in North America at least, the adoption rate of such technology is mixed. According to the J.D. Power 2017 North America Hotel Guest Satisfaction Index Study, only 19 percent of all hotel guests have downloaded a hotel's mobile app, and 38 percent of



those don't use it during their stay. Only about 4 percent of check-ins and 1 percent of check-outs occur using the app. InterContinental Hotels Group CEO Keith Barr told BTN in 2017 the company declined to advance a rollout of mobile room keys because it found adoption was low.

That opens the door for facial recognition to step in and improve the check-in process where, so far, apps have failed. But there's also potential for hotels to deploy facial recognition in other ways.

Facial recognition tech companies, including NEC and Axis Communications, have for a number of years marketed VIP identification software to hospitality companies and other business verticals. Such software uses facial recognition via surveillance videos or closed-circuit TV and alerts a property to the arrival of a VIP found within a database.

Though the application of facial recognition in this particular way has not been spoken of publicly by any major hotel companies, such uses could align with the ongoing push of the hotel industry overall toward personalization as a way to improve the guest experience.

In May, Marriott partnered with Salesforce to build a customer recognition platform designed to enhance personalization and improve interactions between guests and Marriott associates. A number of major hotel companies—including IHG, Radisson Hotel Group and Choice Hotels International—are deploying cloud-based global reservations systems designed to create new capabilities around Big Data and personalization.

While facial recognition seems to be joining the long list of travel industry buzzwords, potential roadblocks still lie ahead. On July 13, Microsoft president Brad Smith published a blog post that urged for closer scrutiny and government regulation around facial recognition technology. Smith cited an ongoing issue around bias—facial recognition often does not correctly identify ethnic minorities—but said, even if that problem was addressed, the issues relating to facial recognition raise “critical questions about our fundamental freedoms.” It may seem odd for a company to urge greater regulation of its products, he said—Microsoft has been a pioneer of facial recognition—but “there are many markets where thoughtful regulation contributes to a healthier dynamic for consumers and producers alike.” Smith also called on tech companies, Microsoft included, to be more selective, transparent and ethically minded in how they develop facial recognition technology. ■

IBM & Travelport Develop Corporate Travel Data Product

BY JAY BOEHMER

IBM and Travelport are launching a jointly developed data system for corporate travel programs that blends IBM Watson artificial intelligence capabilities with Travelport's real-time shopping and historical fare data. “With IBM, we've initiated a data and analytics capability specifically focused on the corporate travel market that we'll take to market in this quarter,” Travelport president and CEO Gordon Wilson said. “It brings together the power of our data, other industry and social data, along with IBM's

expertise in data platforms and the power of their Watson data and analytics engine.”

IBM has been using the data system for its own managed travel program, one of the largest in the world. “They built it for themselves, first off, and now they want to take it out with us to the broader marketplace,” Wilson said.

IBM Travel Manager “will enable corporate travel managers along with their travel management company partner to better understand their travel spend through analysis

and insight through predictive modeling and Watson's scenario planning,” Wilson said. “An example would be offering an answer to a question like, ‘If my travel was booked one week in advance versus one day in advance, how much money would I save?’”

Wilson said IBM and Travelport will sell the product jointly. Travelport's installed base of TMCs is a logical start. “It would enable a mid-tier TMC to have a really competitive product with some of the megas,” he said.

It's not the first time IBM and Travelport have collaborated on corporate travel. IBM was the flagship user of Travelport's Traversa online booking system before it folded. IBM also is a Travelport GDS client. “IBM does all of its corporate travel through Travelport,” said Wilson. “We've been working closely with them for years, and we've got a fantastic technology cooperation. Through that, when we do deals with them, we have joint R&D dollars, and this IBM Travel Manager tool is a product of those joint R&D dollars.” ■

Corporate Travel Acceptance of Airbnb for Work Is Growing & the Company Is Eyeing Users Beyond Business Travelers

Airbnb's presence—and acceptance—continues to grow in the corporate travel space. Its business travel division team heads off to the 2018 Global Business Travel Association Convention in San Diego this week with a new name and evolving use cases for corporate customers. BTN lodging editor Julie Sickel spoke to Airbnb for Work global head David Holyoke about the brand's development.

LAST WE SPOKE, YOU WERE SEEING MORE ACCEPTANCE OF AIRBNB AMONG THE CORPORATE TRAVEL COMMUNITY.

We've had good growth momentum [during the past year]. We've really been bullish with how that's continued into this year. Our ability to bring in companies of all sizes continues to grow at a very fast clip for us. Where we're seeing the sharing economy in general within travel programs is a recognition by travel managers that this is happening, it is occurring. It's not a matter of "Should we do this?" It's that it is and "Let's talk through how to work together around the right use cases." Many times when we're bringing companies on, they're not surprised anymore by the number of employees within their organization that are using Airbnb, that have been expensing it, and they want to start talking about where it makes the most sense in their program.

DO YOU PROVIDE CORPORATES THAT VISIBILITY INTO AIRBNB USAGE ONCE THEY ENGAGE, OR ARE THEY GENERATING IT INTERNALLY BEFORE COMING TO YOU?

A year ago, it was the "Ah-ha! I wasn't aware. I didn't really have visibility. I don't understand why somebody is doing this or using this." We used to hear a lot from companies that "This isn't happening in our program," and when we would show them, they were usually surprised. It took a while to progress those conversations because they were trying to get their arms around it. Today, because Airbnb has been in this space, people come to us proactively. We're having a lot more strategic conversations around the use cases and the employees ... and that's bringing a lot of new users within companies onto the platform.

AS YOU ADD NEW USERS, ARE THE PATTERNS OF BUSINESS TRAVELERS' STAYS CHANGING?

Our fastest-growing segment right now in terms of length of stay is below three nights. It kind of validates that Airbnb for Work is becoming mainstream. It was always about that longer stay. That's still a very big part, but our highest growth rate is less than three nights.



Airbnb's David Holyoke talks:

- Business travel growth
- Shifting patterns of stay & use cases
- Changing the name
- Regulation snags

People are finding that as they get more and more comfortable on the platform, they have a better idea of what they want out of that trip, and length of stay is not necessarily the deciding factor anymore.

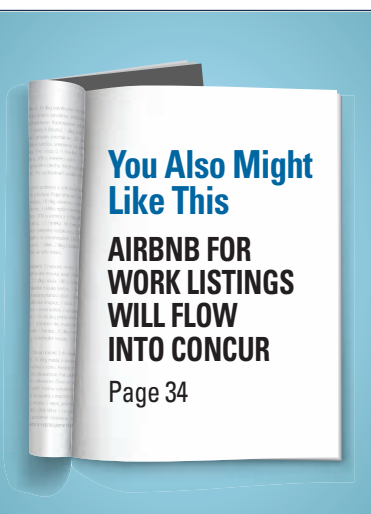
WHAT'S THE REASONING BEHIND THE NAME CHANGE FROM AIRBNB FOR BUSINESS TO AIRBNB FOR WORK?

At the highest level, Airbnb for Business maybe wasn't as on brand as Airbnb for Work. When people are talking, it's "I travel for work." So people do business trips, but the nomenclature is evolving a little bit. The words intersect more and more. Additionally, we're not focused on just the traditional transient business travel use case. We're working heavily on relocations and mobility. And then there are other areas that we're working on with companies in general to think about how to unlock all professionals, not just those that always travel. There's definitely a bigger market for us in the future.

WITH THE CITY OF NEW YORK'S RECENT MEASURE TO FURTHER REGULATE AIRBNB BY COLLECTING HOST DATA—AS WELL AS VARIOUS LOCAL, STATE AND FEDERAL GOVERNMENTS TRYING TO RESTRICT AIRBNB USE—ARE TRAVEL MANAGERS STILL COMING TO YOU WITH LEGAL CONCERNS OR QUESTIONS?

We always have informed conversations with all companies we work with. They do their

"Our fastest-growing segment right now in terms of length of stay is below three nights. It kind of validates that Airbnb for Work is becoming mainstream. It was always about that longer stay."



due diligence. They generally understand ... the policy landscape. ... We generally have very open conversations with our customers or potential customers around that. The fact that we now have over 500 agreements in place around the world certainly demonstrates that we continue to be legitimized by cities and states, as well as full countries, across the board. That's making it a lot easier for companies to move forward with us, but we always continue to have informed conversations where there are opportunities to do so. ◀

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The Upshot of Microsoft's Travel Manifesto

Microsoft stirred up controversy in April with its Travel Manifesto, calling for increased financial transparency in the industry and pushing buyers and suppliers to consider the changes that emerging technologies could bring to the table. Now that the document has marinated in the industry for a while, Microsoft global director of travel, venue sourcing and payment Eric Bailey reflected on its impact with BTN editor-in-chief Elizabeth West.

WHAT WAS THE INTENT OF THE MANIFESTO?

We're seeing changes in corporate travel: changes from different suppliers—airline, hotel and car—[changes from] ridesharing and things like that. It's causing adjustments in business models and [in] the things we do as travelers. We hoped the manifesto would drive a dialogue so the industry can be more aware and prepared for the changes coming in the next three to five years.

SOME OF THE CHANGES SUGGESTED IN THE MANIFESTO IMPACT COMMERCIAL MODELS AND PARTNERSHIPS. HAVE BUYERS AND SUPPLIERS REACTED DIFFERENTLY?

There's been clear support across every single travel buyer I've talked to. I'd say also clear support across startups because the startups are seeing the opportunities that may emerge with changes in the industry or even just new opportunities in the industry. Most of the [established] suppliers I've talked to have read it, which is good, and we're starting to have some conversations around it. I think that there is a hesitancy from some [suppliers] because there are lots of dollars flowing around. When dollars change, business models have to change. That's a dangerous place for companies to be in, or it's a great opportunity. I should really say it's a great opportunity that may appear to be dangerous. That's a better way to put it.

THE MANIFESTO HAS BEEN CONTROVERSIAL FOR SUGGESTING CONFLICT OF INTEREST, PARTICULARLY AT THE TRAVEL MANAGEMENT COMPANY LEVEL.

Transparency is something that we talk about with all our suppliers. Any sort of bias or preferencing away from the best value for what the traveler wants based on the corporate travel program, anything that pushes away from that, makes me suspicious. That conversation has stepped up. There are lots of conversations about transparency and understanding intent.

The challenge is data. The data sucks in this industry, in general. It is not consistent if you look around the world or around the tools. If you don't know what the [financial] incentives are [and] you find something that looks inconsistent or something's missing, you wonder if you need to worry.

THE MANIFESTO ALSO PUT BIG IDEAS ON THE TABLE. USER-OWNED PROFILES WAS A CENTRAL CONCEPT. HOW IS MICROSOFT TRAVEL THINKING ABOUT IT?

If you look at what we're doing today around data, across not just this industry but across the whole world, your data and your ownership of data is going to become extremely important. But there are two forces dragging



Microsoft's Eric Bailey talks:

- Intention behind the Microsoft Travel Manifesto
- How a little controversy drives the right conversations
- What Microsoft's travel department is working

"We're working with EY as an outcome of the manifesto. There are quite a few other companies that we've looked at deeper [innovation] partnerships with ... Is it as fast as I want to be? Nothing's ever as fast as I want it to be."

in opposite directions: your right to have private data and your need to share all your data with everybody. We're not going to trust any companies to do that. The traveler having the ability to own that is ... fundamental to things moving forward. None of us will accept an unpersonalized world in the future.

IS BLOCKCHAIN THE PLATFORM?

It could be. It could be some sort of blockchain profile that is shared in certain ways and you give certain people access to it and you can see who accessed it and you can turn it off. Where the front end of that is, I don't know. It could be a [travel] agency. It could be the GDS. It could be Facebook, LinkedIn or Gmail. Any of these could be your interface [for] that [blockchain profile], but you need robust and very secure data sharing on the back end in order to achieve any of that real personalization.

IN-DESTINATION TRAVELER EXPERIENCE WAS ANOTHER AREA THAT THE MANIFESTO DESCRIBES AS RIPE FOR INNOVATION.

There are multibillion-dollar opportunities there. They're being capitalized on now by complete randomness. Randomness creates stress for travelers. At the end of the day, I just want it to be easier to get your travel done. Solving for that piece is a big opportunity.

THAT SOUNDS LIKE YOUR WORK WITH TRIPISM. IS THE MANIFESTO ACTUALLY A ROAD MAP FOR MICROSOFT TRAVEL?

I don't want to build one-off solutions for Microsoft, but in reality, we sometimes need to do some proof of concepts and work with startups to push along new alternatives for the industry. Eventually, the industry has to respond to these changes, as well. We want to help get people in front of that.

WHAT ARE YOU WORKING ON RIGHT NOW?

Alternative payment is one thing we've started working on. Payment terms right now generally pay suppliers way out or pay short term with a discount. But there are different ways to look at it. Maybe we can look at payment terms based on [supplier] cash flow. Maybe we offer a different alternative using a card solution or potentially a direct bill solution of some sort.

We're also working on a more integrated traveler experience. We have thousands of guests coming to visit [the Microsoft campus] every year. We want to offer an experience that is not like the regular travel experience. How do we have it so that the hotel knows when they're arriving, so that our shuttles know when they're going and everyone along that line can connect? If the person informs the shuttle that they're late, how do we integrate the meal[times] with that information or the appointments with people? How do we allow them to share their data for a little bit and then delete it? On a scale perspective, that's very small, but it tests the concepts.

HAS THE MANIFESTO DRIVEN ANY INNOVATION PARTNERSHIPS WITH OTHER COMPANIES? THE CALL TO ACTION AT THE END OF THE DOCUMENT BASICALLY SAID, "LET'S WORK TOGETHER!"

We're working with EY as an outcome of the manifesto. There are quite a few other companies that we've looked at deeper partnerships with based on some of these conversations. Is it as fast as I want to be? Nothing's ever as fast as I want it to be. ■

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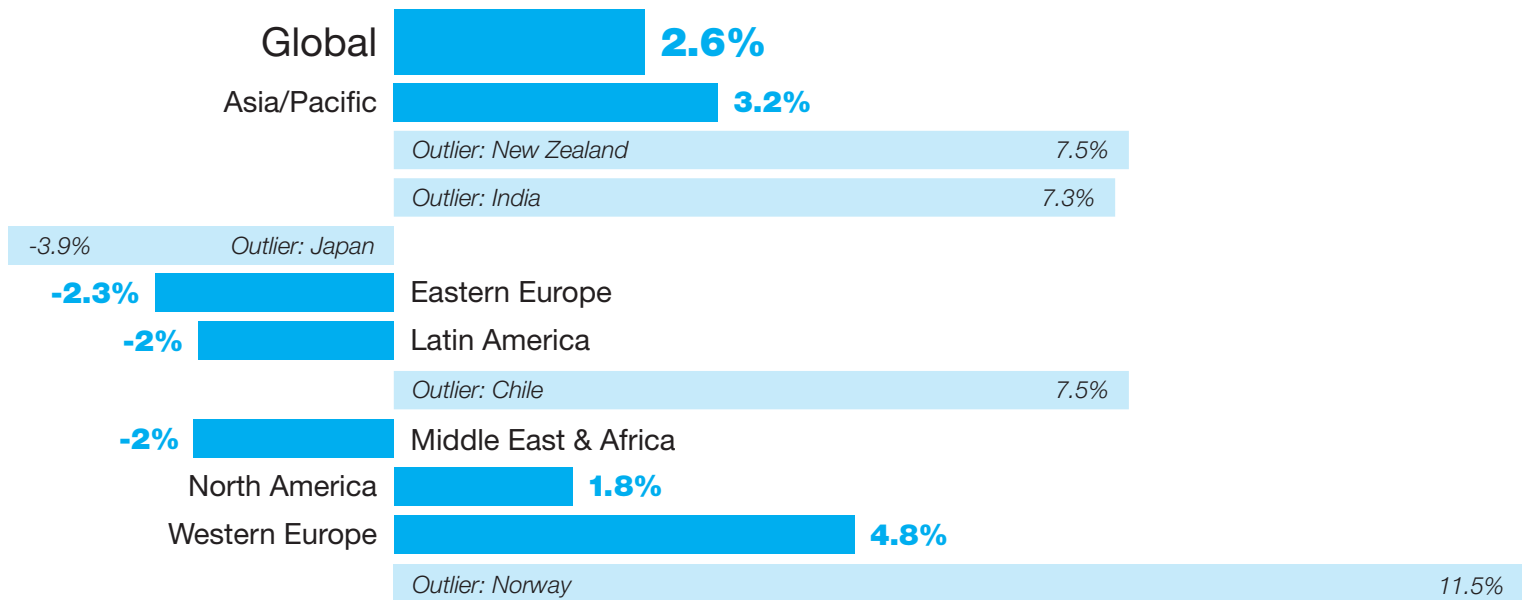
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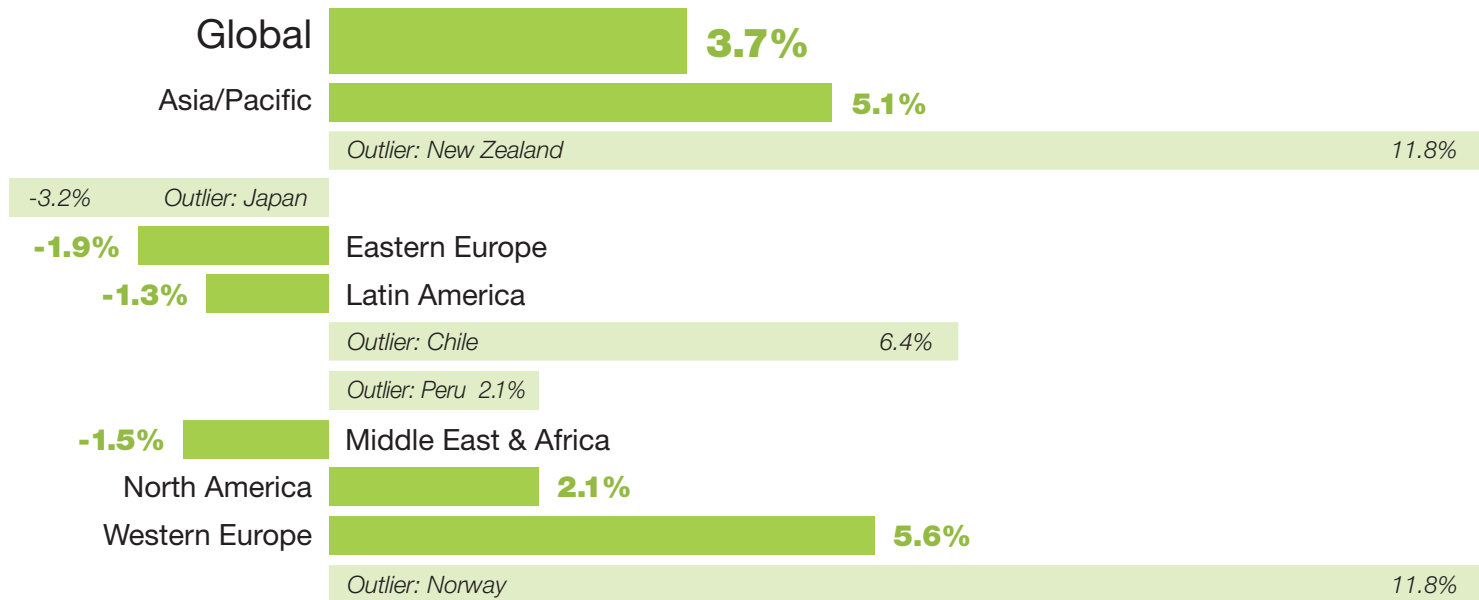
What Will Happen to Travel Prices in 2019?

ON THE NEXT PAGE
City-level hotel rate projections from
American Express Global Business Travel

CWT FORECAST: 2019 AIRFARE CHANGES (BASED ON U.S. DOLLARS)



CWT FORECAST: 2019 HOTEL RATE CHANGES (BASED ON U.S. DOLLARS)



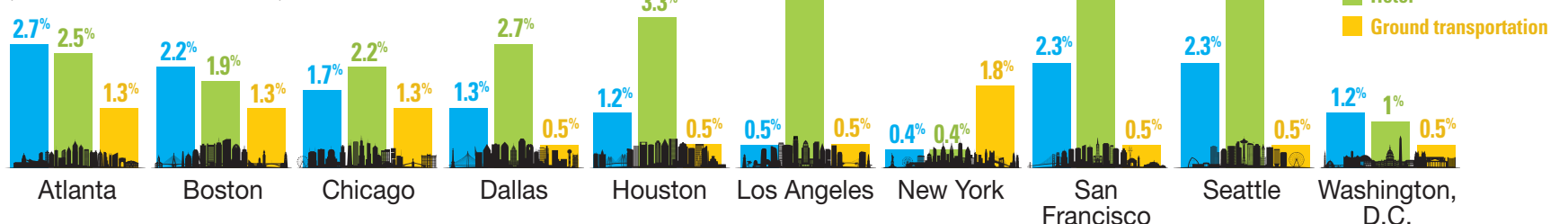
CWT FORECAST: 2019 GROUND TRANSPORTATION RATE CHANGES

(BASED ON U.S. DOLLARS)

Ground transportation rates will remain flat around the world, with the exception of a minor increase in North America of 0.6 percent.

CWT FORECAST: 2019 PRICE CHANGES IN KEY U.S. CITIES

(BASED ON U.S. DOLLARS)



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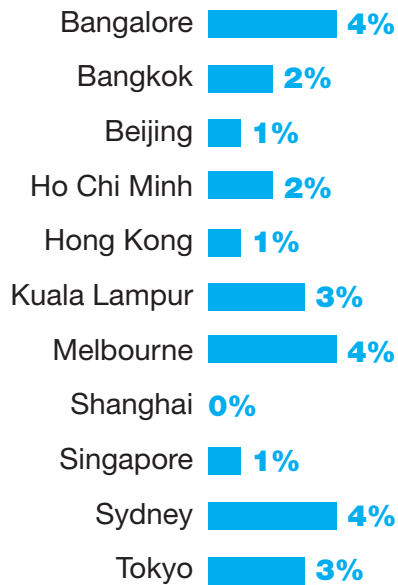
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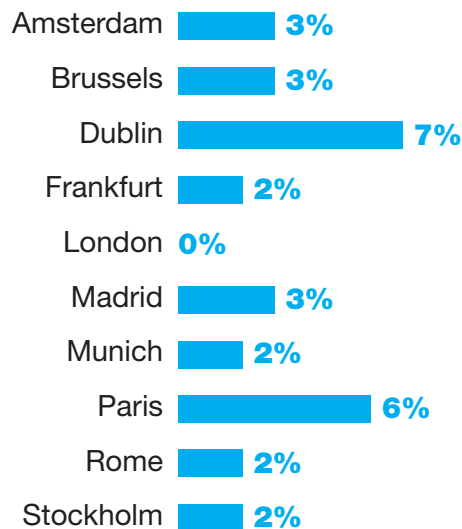


AMEX GBT FORECAST: 2019 HOTEL RATE CHANGES

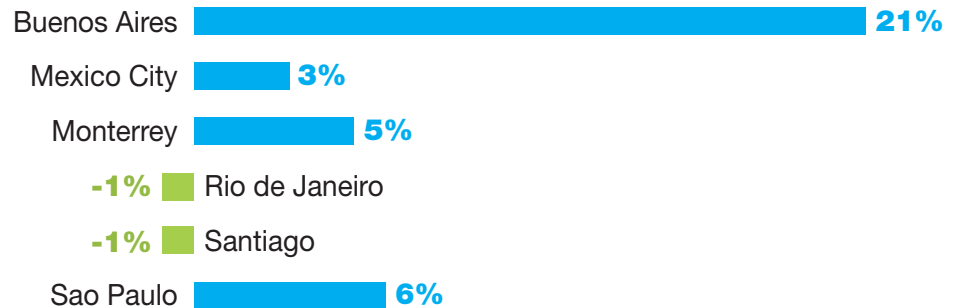
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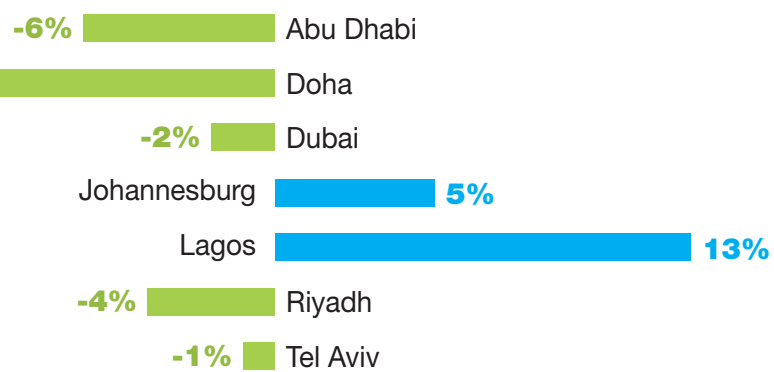
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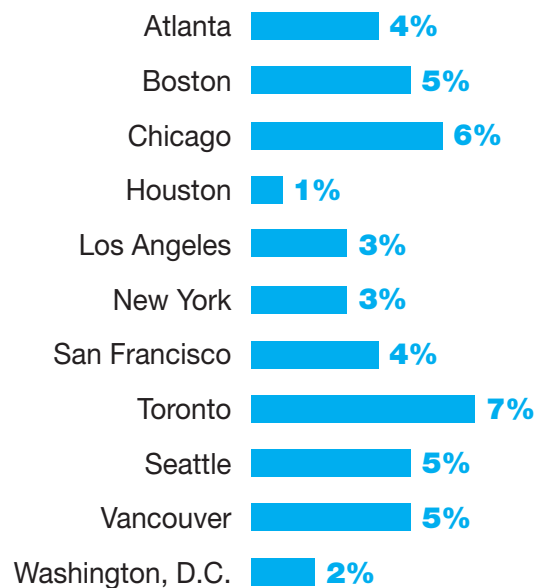
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WHY DO CWT & AMEX GBT'S U.S. CITY HOTEL RATE FORECASTS DIFFER?

Data sources are a factor in the differences between Carlson Wagonlit Travel and American Express Global Business Travel's projections for hotel rate changes in U.S. cities. Each travel management company bases its forecast on its own clients' booking data; that explains some of the variance. Each source also employs a different roster of external sources. CWT uses a statistical model by Rockport Analytics that brings in data from OAG, STR, Moody's Analytics, the International Monetary Fund, the United Nations and others. Amex GBT employs IMF and STR data, among others. How each TMC weighs each internal and external data point also plays a role. Relatedly, one TMC might lean toward the prices suppliers anticipate, while the other could be closer to travel buyers' expectations.

What it all means is that the likeliest scenario for each city lies somewhere between the two TMCs' forecasts. As Bjorn Hanson, a clinical professor at the NYU School of Professional Studies Jonathan M. Tisch Center for Hospitality and Tourism, said:

“Sounds like an opening salvo for negotiations.”

—BJORN HANSON

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2018 Salaries Spring Back

Income gap remains between men & women

BY ELIZABETH WEST

Respondent demographics are again at the center of BTN's Annual Salary Survey results. In the 2017 survey, a significant influx of small and midsize program managers and a larger-than-usual dose of early-career respondents drove average salary numbers down. This year, program demographics move closer to those recorded in 2016, when BTN recorded the highest ever watermark for travel manager salaries. As a result, in the latest survey, average travel manager income jumps back in line with the growth trajectory of the past 15 years.

What Drives Salary

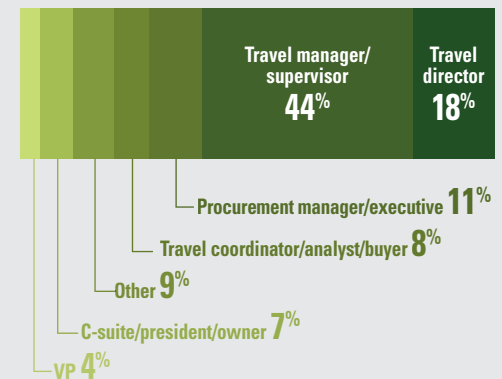
The dramatic shifts shed some light on what factors most influence salary. The two most consistent indicators of travel manager salary levels are travel program size and the travel manager's job title. To a lesser extent, the number of years an individual has been managing travel correlates with salary level; however, this indicator is most relevant when the travel manager's career is young. Those managing travel for less than a year report an average salary of \$71,500 this year. Respondents who have managed travel for one to three years are much higher, at \$98,170, but that's still considerably below the \$115,306 overall average.

Factors beyond years of experience correlate more direct with salary levels. Take job title: A finance director or VP for a relatively small company may take on travel management responsibilities as the company grows. Though it's only part of the individual's job description, the salary itself is commensurate with the employee's title, not how long the employee has managed travel. That's an important nuance that plays out especially in the small and midmarket, but it also can go the other way. The travel management or "coordination" function is delegated even more often to an executive assistant or travel coordinator, and that drives the travel manager salary downward. In larger programs, too, where travel management requires a team, job titles like coordinator, buyer and analyst may command lower salaries.

BTN's survey pegs the average salary for a travel coordinator, buyer or analyst at \$70,343. Those with travel manager or supervisor job titles, however, command an average

WHO TOOK BTN'S SALARY SURVEY?

Respondents by Job Title 2018¹



Respondents by Travel Program Size

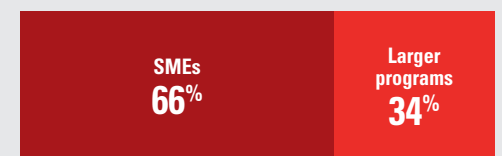
Small & midsize enterprises manage \$2 million to \$12 million or less in annual U.S.-booked air volume

2018²

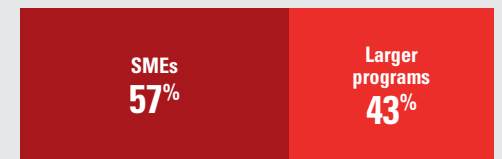


Undisclosed 1%

2017³



2016⁴



Respondents by Experience

2018⁵



2017⁶



2016⁷



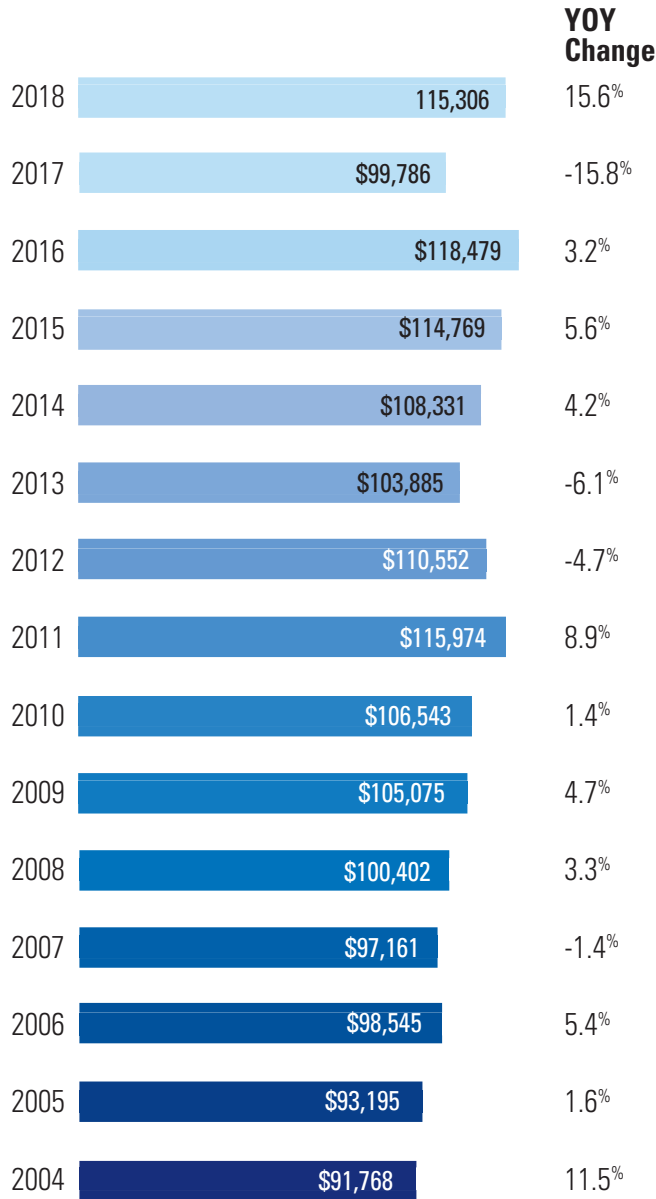
Source: BTN Salary Survey; the 2018 survey of 278 travel managers was conducted May 8 to June 25, 2018

¹275 respondents

²278 respondents

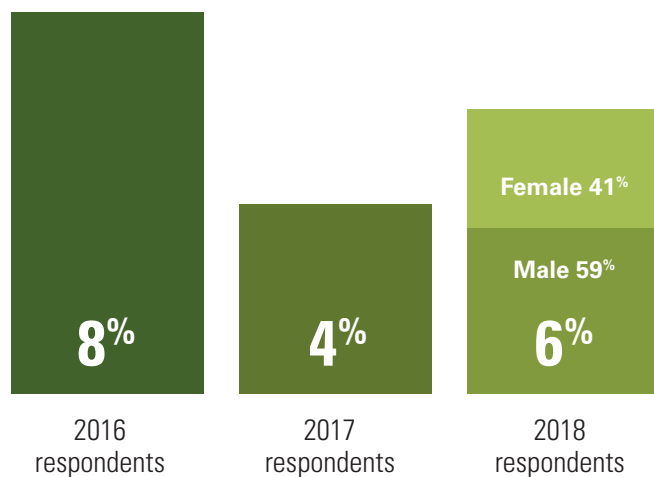
HOW 2018 RESPONDENTS' SALARIES COMPARE TO PREVIOUS SURVEYS

The average salary, bonuses & incentives as of Jan. 1 of each year are based on responses to that year's survey.



\$200K Club

Travel managers whose compensation topped \$200,000

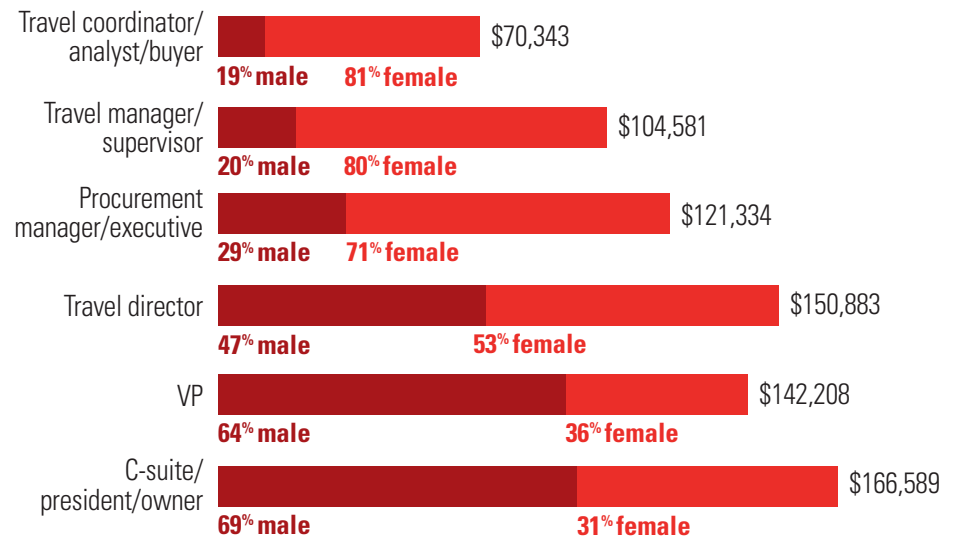


HOW 2018 RESPONDENTS' SALARIES COMPARE TO EACH OTHER

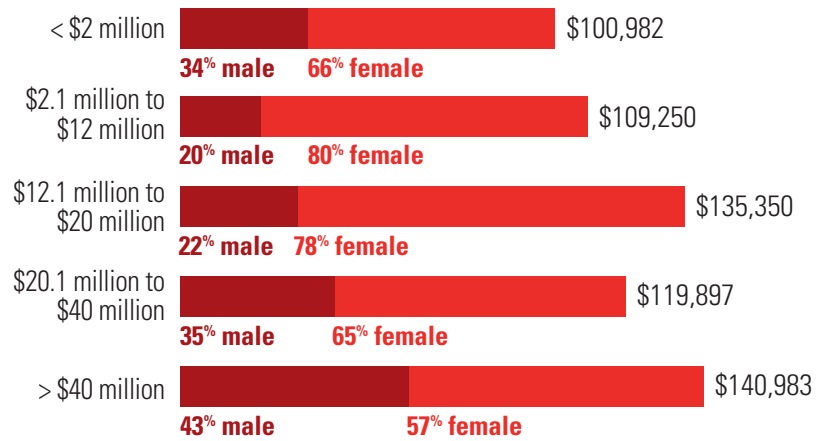
The average salary among 2018 respondents rose 6% from the 2017 salaries. The average female's salary rose 6%, while the average male's increased 5.8%.



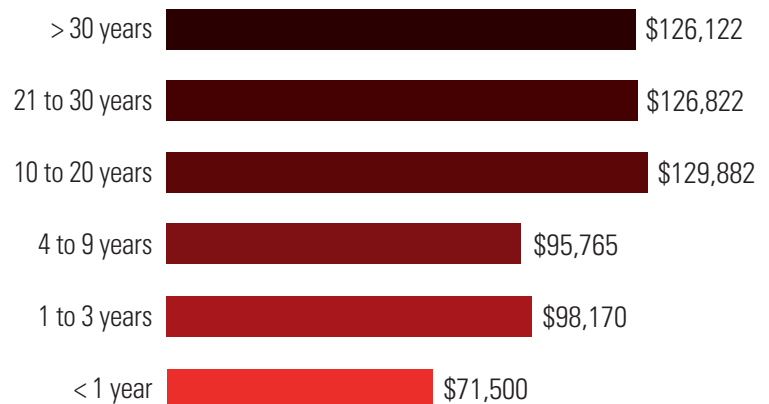
2018 Average Salaries by Job Title



2018 Average Salaries by Travel Program's Annual U.S.-Booked Air Spend



2018 Average Salaries by Experience



³11 respondents

⁴194 respondents

⁵256 respondents

⁶299 respondents

⁷192 respondents

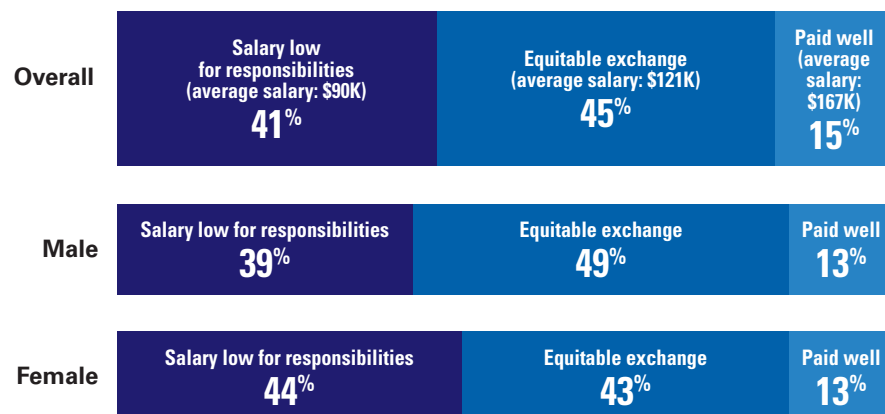
⁸277 respondents

DO COMPANIES VALUE TRAVEL MANAGERS?

How Travel Managers Feel About Recognition¹



How Travel Managers Feel About Salaries²



annual salary of \$104,581. Procurement managers and executives average \$121,344, whereas those who've graduated to a specialized travel director status bring in an average salary of \$150,883. That's more than the average VP, whose general profile includes managing travel as part of his or her responsibilities for a smaller organization. Dedicated travel directors tend to oversee travel full time for larger programs and often have one or more travel buyers or analysts reporting to them. Presidents, owners, CEOs and others in the C-suite who manage travel are in the same boat as those VPs: Their average \$166,589 salary reflects a much broader job description at a smaller organization that spends less on travel.

To drive the point home, check out the chart 2018 Average Salaries by Travel Program's Annual U.S.-Booked Air Spend on page 13. The travel management function in programs wielding less than \$2 million averages a yearly income of \$100,982. Moving up the scale, the travel management function in programs spending \$2.1 million to \$12 million commands an average salary of \$109,250. The average salary jumps to \$135,350 for programs spending \$12.1 million to \$20 million a year. It falls in the next bracket to \$119,879, perhaps because these programs require a larger staff roster, populated by junior travel managers; this is logical but not something BTN's survey data can prove or disprove. The biggest programs invest the most in the travel management function; among those companies, the average salary reaches \$140,983.

BTN's survey features fewer early-career travel managers this year: 14 percent have three years of experience or less, compared with 23 percent in 2017. Fewer small and midsize program managers responded to the survey: 62 percent of respondents versus 66 percent last year. The study includes a larger share of senior-level titles; 18 percent of respondents categorize themselves as travel directors, compared with 14 percent last year. In addition, a larger percentage of respondents sit in the \$200K Club: 6 percent command salaries at or above \$200,000, compared with just 4 percent last year. As always, BTN has disqualified travel agent respondents and removed incomplete surveys and outliers, both high and low, as all those responses would have skewed results.

The Value of Managing Travel

While a 15.6 percent salary jump from last year's respondents to this year's respondents provided a great headline opportunity, perhaps the most important statistic in the survey is this: The salaries of this year's respondents has increased 6 percent over the same group's 2017 salaries. That's double the 3 percent average that consulting firm Korn Ferry predicted for all U.S. salaries.

That figure indicates that employers value the travel management function highly. Savings and cost avoidance form employers' No. 1 performance objectives for travel managers: More than two-thirds of respondents are held to this metric. Beyond that, 42 percent are measured by their contribution of value to the company and 40 percent work to meet year-over-year program improvement statistics.

These performance metrics inform how travel managers prioritize their time. The top three responsibilities for travel managers, according to BTN's survey, are supplier sourcing, handled by 87 percent of respondents; travel data management, handled by 82 percent; and travel program communications, handled by

¹255 respondents

²256 respondents

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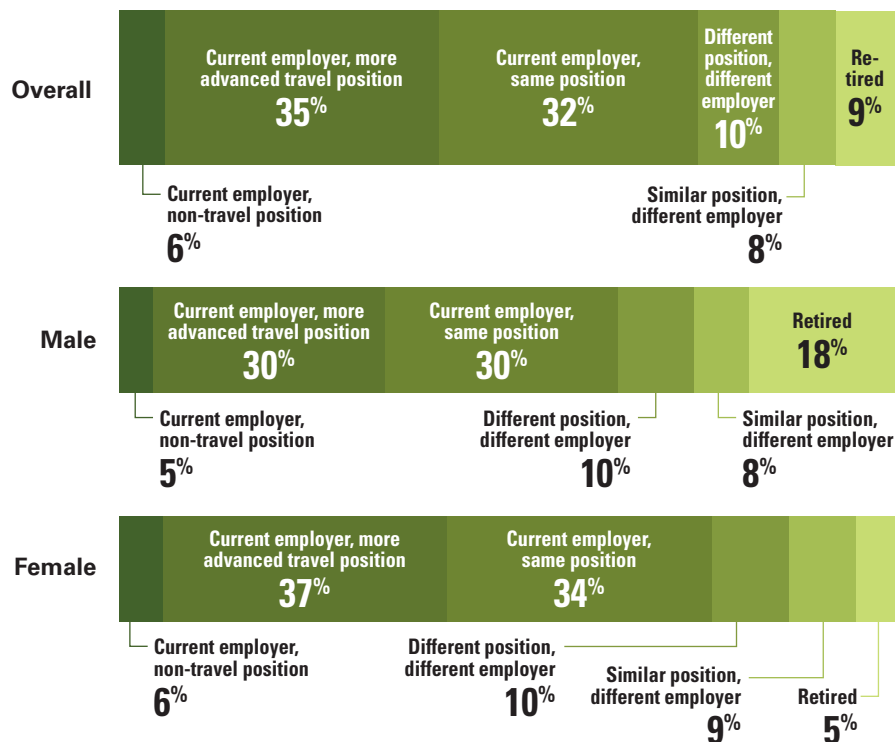
According to the Services & Amenities category of the 2017 Business Travel News Airline Survey, published on November 20, 2017. Delta Air Lines earned the top overall score for the 7th consecutive year (2011-17) on the Business Travel News (BTN) Airline survey.

WHAT TRAVEL MANAGERS EXPECT OVER THE NEXT TWO YEARS

Where They See Salaries Going in General¹



Where They See Themselves²



75 percent. Sixty-six percent handle travel risk management, an addition to this year's survey. Climbing the ladder are payment systems, handled by 61 percent, up from 46 percent two years ago, and expense management, handled by 51 percent, up from 34 percent two years ago. Responsibility for meetings management is also on the rise, up 10 percentage points over the past two years. Mobile travel technology management has remained relatively steady over the same period.

Survey respondents indicate that travel managers constantly broaden the scope of their responsibilities to meet their performance goals. Many cite "added responsibilities" in general. A handful note that the broader scope has come with a commensurate pay increase, a promotion or additional headcount to support growing programs. A few say the opposite, such as one respondent who reports, "More responsibility, same pay." Others are more specific, citing major technology changes like booking and expense tools. Another is excited to "work with all the new technology providers." Several mention a new focus on meetings.

Asked where they see the most opportunity to advance in their positions, however, nearly a third double down on the traditional travel management role of supplier sourcing and procurement, while 16 percent peg travel data management as the next wave of travel management.

Some respondents say their travel programs have new orientations. "We are becoming more focused on the traveler," says one, while another says, "Our focus is shifting from savings to traveler comfort and safety." Several respondents say there's an opportunity to advance their careers by increasing engagement and outreach efforts, the goal of which is to give each travel programs a "brand" and position it as a benefit to employees. While only a handful say this opportunity represents a major change, a comparison to prior surveys suggests the shift is indeed widespread. This year, 41 percent of respondents say traveler satisfaction metrics are among their performance standards. That's double the respondents held to that metric just two years ago, making traveler satisfaction the fastest-growing performance metric in BTN's survey.

The study shows positive results in terms of how well travel managers are recognized by their organizations for all these efforts. Three-quarters of respondents are either "adequately recognized" or "well recognized" by their employers. Only a quarter are "not well recognized."

Compensation Satisfaction

When it comes to actual compensation, however, respondent attitudes are not as sunny. Forty-one percent feel their salaries are low for the responsibilities they shoulder. The average salary among those who feel they're underpaid? \$90,000. On the brighter side, 45 percent say their salaries are an equitable exchange for their work. The average salary for those satisfied with their pay: \$121,000. Fifteen percent feel their salaries are generous. Average pay among this group: \$167,000.

Nearly two-thirds of survey respondents actively pursued more advanced positions and compensation in the past 12 months, and some respondents took a multipronged approach. Twenty-eight percent asked for a raise, and 22 percent pursued a promotion. Twelve percent changed companies, 7 percent engaged a career coach and 14 percent took some other avenue toward career development.

Despite the widespread salary satisfaction slump, just 18 percent of respondents see themselves looking for a new employer within

¹256 respondents

²265 respondents

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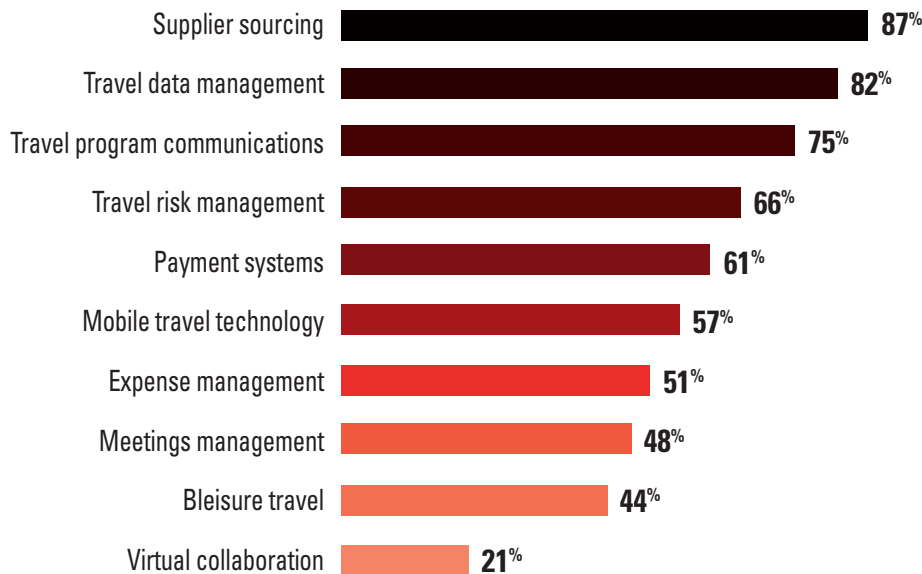
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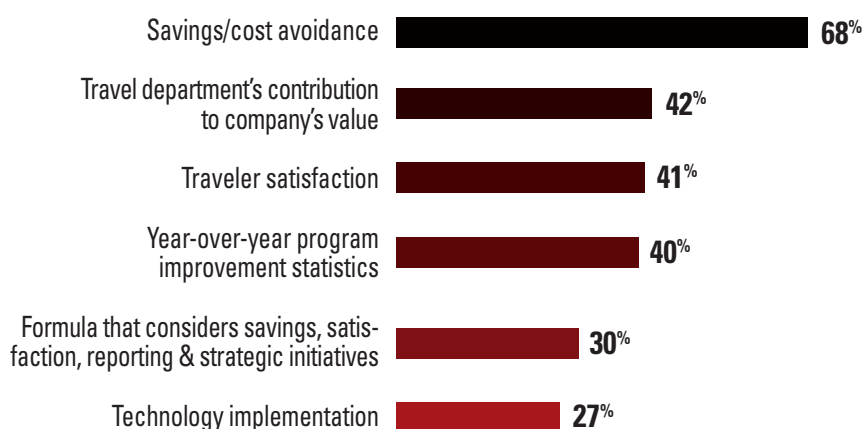
BTN'S 35TH ANNUAL SALARY SURVEY & REPORT

RESPONSIBILITIES & PERFORMANCE METRICS

What Travel Managers Do¹

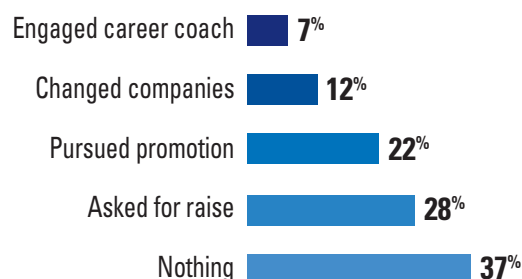


How Their Companies Measure Their Performance²

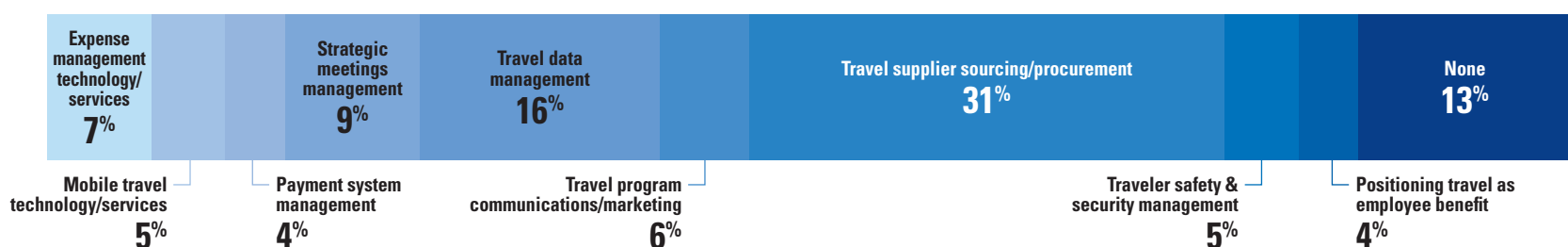


CAREER ADVANCEMENT

What Travel Managers Did in the Past Year¹



Where They See the Next Opportunity³



¹256 respondents

²265 respondents

³250 respondents

two years. Rather, 35 percent see themselves in more advanced travel-related positions in their current companies, while 6 percent expect to stay at their companies but move to positions outside travel management. Thirty-two percent anticipate staying in their current positions with their current employers. Nine percent are headed for retirement.

Asked about the trajectory of travel manager salaries over the next two years, 47 percent expect salaries to rise, while 48 percent expect them to stay the same. Only 5 percent expect travel manager salaries to decline.

Women's Salaries Trail

Per usual in BTN's salary survey, female respondents make about 79 cents to every dollar their male counterparts earn. The average salary for female respondents is \$106,872, while the average for male respondents is \$134,917. Despite the preponderance of women wielding travel management roles—70 percent of survey respondents are women—a closer look at the key salary indicators shows that, overall, female respondents hold their roles in smaller companies and with more junior titles than their male counterparts.

Among respondents with the most junior title, travel buyer/coordinator/analyst, 81 percent are women. The next rung on the title ladder is nearly as lopsided: Among respondents with the travel manager/supervisor title, 80 percent are women. Among procurement managers/executives, who bring in significantly higher salaries, 71 percent are women. Jump to the highly paid travel director level, and only 53 percent are women. Keep in mind that 70 percent of respondents to the survey are women, which means the procurement titles show the expected proportions if all title levels are representative of overall survey demographics.

Same story, different tune for the other best indicator of salary level: travel program size. Programs that spend \$2.1 million to \$20 million on U.S.-booked air spend show a more robust representation of female travel managers than do larger programs. The largest programs, where travel manager pay is consistently higher, have the highest share of men in travel management ranks.

These dynamics play out as a gap in salary between male and female respondents. Female respondents, however, do report a minutely higher growth rate in their salaries, 6 percent year over year, compared with men's 5.8 percent.

For anyone, male or female, looking to advance their salaries, the message from BTN's 2018 salary survey is this: Secure a title change when you ask for that raise at your current company. It's a commodity that you can take with you wherever you go. For those looking to change companies but remain in a travel management position? Two words: Aim big. ■



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What Do Alipay & WeChat Pay Mean for Corporate Payments?

By JoAnn DeLuna



Around the world, many merchants enable millions of outbound Chinese tourists to pay for items as they do at home. These merchants now accept the two most widely used Chinese mobile apps: Alipay and WeChat Pay. These apps “are processing 10 to 11 times more transactions than the U.S. as a whole,” said Bradley Seitz, a partner in consulting firm Nina & Pinta.

Like Uber and Airbnb, which were banned by corporations initially but overwhelmingly embraced by business travelers, Alipay and WeChat are game-changing consumer tools. It may take time for corporates to adopt them, but the travel industry is working toward greater acceptance, even if primarily on the leisure side for now. But once the business travel community does adopt Alipay and WeChat and such transactions begin replacing corporate card transactions, will banks and travel managers have to sacrifice data at the altar of usability?

MORE THAN MOBILE WALLETS

Alipay and WeChat Pay are digital payment apps that function similarly to PayPal, but they’re so much more. Users can link credit and debit cards, but because credit cards aren’t popular in the region, users tend to transfer money from their Chinese bank accounts into the platforms, where the money is held in escrow. By charging a percentage fee for transferring the funds back into bank accounts, the apps encourage users to keep the money within the platforms. Users can shop online, make in-app purchases and

make purchases at participating merchants and vending machines by scanning QR codes with their phones.

Additionally, people can use Alipay, which launched in 2004, to “hail a cab, book a hotel, buy movie tickets, pay utility bills, make appointments with doctors or purchase wealth management products,” according to the Chinese mobile app. In March, Alipay claimed more than 600 million active Chinese users, as well as partnerships with over 200 Chinese financial institutions. It then announced a partnership with payment systems company First Data to enable Alipay acceptance at an additional 35,000 North American merchants.

WeChat Pay is the mobile payment capability of WeChat, an online social and messaging network that launched in 2011 and offers functions similar to Alipay’s, including ride-hailing, food ordering and hotel booking. WeChat is like WhatsApp, Facebook, Twitter, Instagram, Venmo, Skype and Slack rolled into one, making it particularly popular with those 35 and younger and thus with advertisers. WeChat has more than 1 billion monthly active users and this year overtook Alipay as the most widely used app in China. WeChat Pay launched in 2013 and had reached 800 million users as of March, according to TechNode.

“China has skipped plastic and has immediately switched to mobile payment,” an Air-Plus spokesperson said. Moreover, “WeChat and Alipay play a completely different role

in everyday Chinese life. Both platforms are not only payment methods but platforms that cover the most diverse areas of life.”

SLOWLY BUT SURELY?

Progress to accept Alipay and WeChat Pay outside China is slow, especially in the U.S., where mobile payments are less advanced than in Asia/Pacific and Europe. “WeChat is obviously very strong in China, and they’re doing an awful lot to expand the footprint beyond mainland China,” said BMO head of North American cards Steve Pedersen. “This has been the catch-22: If you build it, will they come? That’s the hope.”

Pedersen believes Alipay will be easier than WeChat Pay to implement in North America because it follows traditional payment rails more closely. The cost of point-of-sale systems, though, “is not inconsequential,” he said. “Think about the U.S.’s challenges in getting terminals for chip and contactless [cards]. It’s yet another challenge.”

In 2013, UATP enabled airlines and other travel partners like hotels and car rental companies to accept Alipay for direct bookings made online. To date, however, UATP has only two airlines that have gone live with Alipay. And in July, Airlines Reporting Corp. began processing Alipay transactions (see page 32).

Also in July, Merlin Entertainments—which owns attractions like the London Eye, Madame Tussauds and Legoland—allowed Chinese tourists to use Alipay in London. Harrods, Selfridges Heathrow Airport and others had already enabled Alipay.

In January, Bank of America enabled WeChat Pay for corporate cards. It limits use, however, to those with mobile phone numbers and bank accounts from China, Hong Kong, Macau or Taiwan, explained Amit Sharma, Bank of America head of cross currency product and commercial cards in Asia/Pacific. While the bank sees WeChat use among corporates, Sharma said, it is “not yet that significant.”

WHAT ABOUT THE DATA?

Both Sharma and Pedersen said business travelers to and within Asia/Pacific can use corporate cards with established local and international merchants without much trouble. For other merchants, however, cash seems to be the easy way for travelers to handle daily expenses, Sharma said. While companies want to move away from cash transactions, they make exceptions for employees traveling to China, he said. WeChat and Alipay could solve for that problem, minimizing travelers’ need for cash. However, the transactions can be as opaque to travel managers as cash expenses are, as the charges appear on card statements simply as “WeChat transaction.”

“As yet, we have not seen the Level 3 data flow through,” Sharma said. “Organizations will need to assess their appetite to approve such transactions, as they will lose the visibility on whether or not the transaction is within policy [and] at an approved merchant, especially when the transaction is not associated with a receipt.” For travel

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HOT TOPICS

managers who have increased corporate card usage and weeded out cash transactions, this could feel like reverting to a bad habit. China Market Research Group senior analyst Ben Cavender said both Alipay and WeChat issue digital invoices that travelers can share with their employers for reimbursement.

RIISING POSSIBILITIES?

Considering the high number of transactions occurring on these platforms, BMO's Pedersen doesn't doubt Alipay and WeChat will be an "absolute success" outside China. But he

anticipates adoption will be faster in some jurisdictions than others, and he stopped short of offering a time line. "For international cardholders traveling to China, WeChat/Alipay are the only options," Sharma said. "For merchants outside of China, we see more options to offer WeChat/Alipay to cater for Chinese cardholders, in addition to other options."

For the apps to work for corporate travel programs, however, banks and corporate customers will have to be able to tap the data. If Alipay and WeChat don't want to feed the data directly to the banks, card networks or travel management

companies, perhaps they can launch business versions of their platforms to feed receipts into expense systems, as Airbnb, Lyft and Uber have.

"If they start passing information, does it actually start opening up the door for adoption? Maybe," Pedersen said. "[But] if today you have a card program with us or one of the other banks and it's working, is this necessarily the pivot you want to make—to add to the payment suite—or go with what [already] works?"

Companies may embrace the apps regardless, as the decision may not be up to them. Just ask Uber and Airbnb. ■

The Geopolitics Driving Traveler Risk

Brandon Thompson, global managing director of Drum Cussac, & his colleagues at the global travel risk consultancy rounded up the geopolitical risk profiles of various world regions

Escalating geopolitical tensions have created a charged environment for business travelers, even in regions that traditionally have been considered stable. International commerce, deals and development must continue, but corporations sending employees around the globe should be aware of how regional dynamics may affect them and should take practical precautions.

EUROPE

Political divisions, insurgent parties and populist policies were evident throughout Europe in the first half of 2018, culminating with Western Europe's first populist government in Italy. Conflicts between Italy and the European Union are likely, owing to the commitment of the Five Star Movement and League political parties to a hard-line stance on immigration amid EU asylum reforms. Populist policies are also proving a challenge in both the U.K. and Germany. In the U.K., the conservative government's Brexit negotiations seem unable to avoid roadblock after roadblock amid party infighting, while support for Angela Merkel's Christian Democratic Union continues to shrink in the face of Germany's own anti-immigrant populism. When traveling for business, especially between the U.K. and the continent, it's best to keep a low profile and avoid saying anything too controversial. Protests and riots for and against European populism are becoming more common, and travelers would do well to avoid large gatherings where things may get violent.

AMERICAS

Populist movements also have dominated the political scene across the Americas, and political

risks are clearly present in Latin America ahead of important elections in the latter half of 2018, particularly in Brazil. Significant antigovernment protests in Nicaragua and Venezuela have led to deteriorations in both the security environment and political scene. This could



increase the presence of paramilitary and criminal groups, leading to even more lawlessness in these countries. Travelers should stay alert and aware of their surroundings when traveling to Central or South America. These challenges are compounded by the incoming 2018 hurricane season, which will put residents and travelers at risk throughout the Caribbean, Gulf of Mexico and along the Atlantic coast of the U.S.

MIDDLE EAST & NORTH AFRICA

The main driver of risk in the Middle East has been the geopolitical rivalry between Iran and Saudi Arabia. Iran continues to wage a proxy

war by funding Houthi rebels in their fight against Saudi-backed Yemeni forces. Unrest in Iran also has been stoked by protests over economic policies, which have been exacerbated by the U.S. withdrawal from the "Iran deal." If the U.S. follows through on proposed sanctions, travelers may bear the brunt of anti-Western sentiment. The region also is experiencing severe unrest in the wake of the U.S.'s recognition of Jerusalem as the capital of Israel, eschewing decades of political dogma. Protests continue to escalate into rioting and gunfire. Travelers in the region should avoid public gatherings, especially near the West Bank.

SUB-SAHARAN AFRICA

Entrenched leadership continues to pose a challenge across Africa. The continent is home to some of the world's longest-serving heads of state, and recent attempts to extend their tenure have met with increasingly violent resistance, notably the de facto coup against Robert Mugabe in Zimbabwe. Instability throughout Central and Eastern Africa is likely, though successful elections during the next 12 months could diffuse tension and calm the political landscape. The presence of armed groups is another security risk, most notably in South Sudan, Somalia, Mali and the Central African Republic. Travelers would be wise to travel with protection agents and in chauffeured transport if heading to these nations on business.

ASIA/PACIFIC

Despite the violent rhetoric between North Korea and the U.S. at the start of the year, there have been positive developments on the Korean peninsula. While 2017 ended with missile tests and nuclear tests, 2018 started positively with the North participating in the Winter Olympics in South Korea. Tensions were further eased following a summit between the U.S. president and the leader of North Korea. However, the talks seemed more concerned with the historical prestige of the event rather than with agreement on concrete terms, so it wouldn't be surprising to see more posturing between Kim Jong Un and Donald Trump in the absence of significant concessions. ■

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Becca Rabinowitz, Co-Founder & Strategic Initiatives Manager of SpotHero for Business, which took home 2017's Business Travel Innovator Award



Brian Beard, President of DVI, which took home 2017's People's Choice Business Travel Innovator Award



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Blockchain's Early Travel Industry Movers

By Julie Sickel

More concept than concrete. That's blockchain's place right now in the world and in travel. Here, though, are three companies bringing blockchain to life in the travel industry.

STEP'S PLAN TO PUT HOTELS ON THE BLOCKCHAIN

Blockchain may be an industry buzzword, but STEP—Simple Travel Ecosystem Protocol—is trying to move beyond the buzz to get the hotel industry comfortable with blockchain.

Founder and CEO David Brillembourg spent more than a decade buying and structuring hotel deals through private equity and working in tech before that. He said moving hotel rooms to the blockchain would address major pain points among hotel owners around high distribution costs from third-party sales and perishability of inventory. It also would offer a new way for customers to purchase rooms.

Working with hotel owners, STEP would tokenize hotel inventory, making a single room worth one coin. Coins then could be purchased by an individual and used directly with the hotel, bypassing online travel agencies and the 20 percent commissions they collect from hotels. Or a corporate or other volume buyer could buy a chunk of rooms and establish a smart contract. "A company could come in and say, 'OK, your inventory is tokenized and I want to buy the tokens from you and I just want a smart contract that I'm locking this amount of rooms. I'm going to buy this amount of tokens that are backed by this amount of reservations and I'm going to use them however I want, whenever I want,'" Brillembourg said. "The more you buy, the more discounts you get."

He said the best way to think of STEP in its current stage would be as an additional sales channel, one that charges only a 2.5 percent commission to hotels, similar to a payment provider. "We're industry-friendly disruptors," he said.

For hoteliers skeptical about blockchain, Brillembourg is launching a proof-of-concept property in San Juan under his new Loop Hotels brand. Hoteliers can see how STEP works at this blockchain-driven property or can adopt the Loop brand as a turnkey solution. Brillembourg will own the San Juan property and expects to open it in September.

HRS BRINGS TRAVELER PROFILES & ID VERIFICATION TO THE BLOCKCHAIN

The May 25 deadline for Global Data Protection Regulation may have loomed heavy for some global firms, but hotel solutions company HRS saw an opportunity to use blockchain to address data protection in the hotel industry.

HRS VP of product Martin Biermann said the company always has complied with the Payment Card Industry Data Security Standard in handling traveler payment cards and passed along sensitive data, such as passport information, securely. But GDPR requires that companies be able to tell travelers what data they've shared with which hotels and be able to delete that data. Thus, the tradition of suppliers simply trusting hotels to remove traveler information from their systems no longer cuts it.

Enter blockchain. HRS creates traveler profiles and stores them on blockchain's transparent, distributed ledger, which hotels share. Biermann said that enables HRS to show corporates and individual travelers what HRS has shared and whether a hotel has deleted the profile from its own system. "Based on that, we can provide auditing capabilities to the company and say, 'Ninety percent of your hotels have deleted the information properly on time, and 10 percent we're working with after to make sure this is happening,'" Biermann said. The capability is useful especially for some properties in China and other markets where a travel manager would have no clue how to make sure a hotel had deleted a traveler's data."

HRS also is looking to blockchain to crack down on fraud. With client Siemens, it has built

a blockchain-based unique authentication code for travelers to verify their identities at check-in. The project addresses a growing problem in which scammers buy forged corporate IDs on websites like Taobao and use them at check-in to obtain corporate negotiated rates.

Down the road, as HRS moves to put traveler profiles on blockchain, it hopes to allow users to keep their secure traveler profiles as they change companies. "You want to take your information with you," Biermann said. "You don't want your old employer to keep your traveler profile forever."

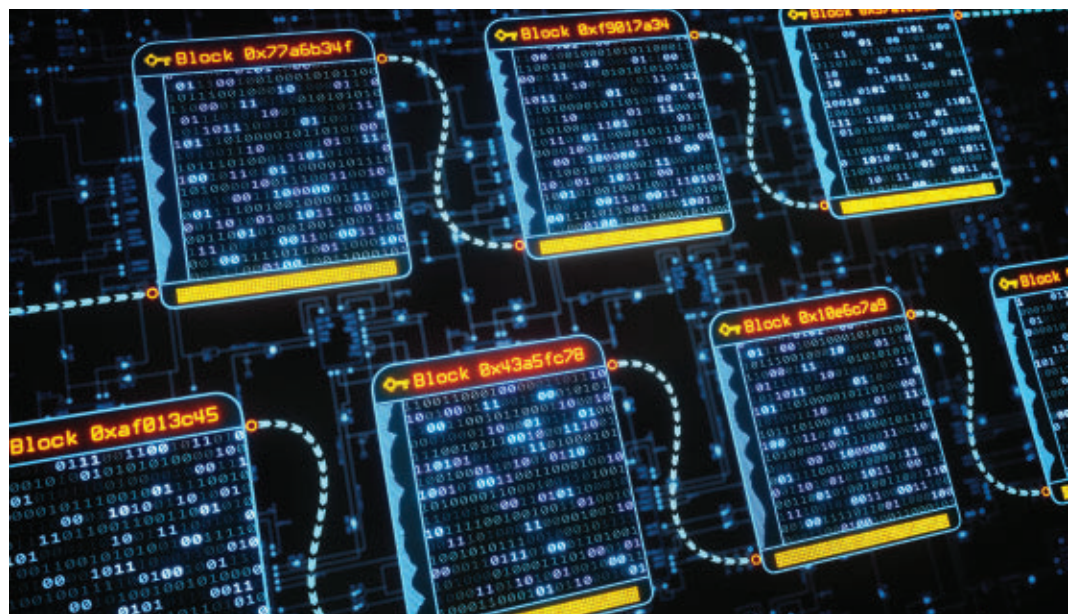
WINDING TREE IS DESIGNING ITS DISTRIBUTION PLATFORM

Since Winding Tree closed its initial coin offering on Feb. 25, raising \$14.2 million and 15,239 Ethereum tokens, the blockchain-based distribution startup has been building its platform. Winding Tree co-founder and Web developer Augusto Lemble wrote in a July 30 blog post that the company's "most significant milestone" in the second quarter was developing the index, the "central piece" of the platform.

The index is a smart contract that lists Uniform Resource Identifiers that provide hotel information, availability and pricing. Winding Tree reviewed existing industry data formats, including application programming interfaces, to create its first version of the data structures. The company is working on defining amenities, incorporating restrictions that companies may have and globalizing the product so it's available in more languages and geographies.

This month, Winding Tree will release Crypto Bookings, allowing users to book inventory, via blockchain, from a single hotel in Berlin. It will merge with the Winding Tree Network prototype that's launching in the third quarter. "We built a very basic booking engine that sources inventory from the supply the hotel uploads," said chief information officer Dave Montali.

—Additional reporting by JoAnn DeLuna



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Cvent Pushes Global, Modern & Unified Vision

Cvent's ambitions were on full display at its recent Connect conference in Las Vegas. The company is making major investments to grow its international footprint, modernize and unify its technology platform and capitalize on a data-intensive market.

"The biggest change we've seen is growth," Cvent CEO Reggie Aggarwal said about the past year. "We are growing faster now than [the company] ever has over the last 19 years. We have a bigger global footprint, [with] global offices around the world. We opened offices in Australia and Singapore last year, and in the next 90 days, we'll open offices in Dubai and Frankfurt." With a growing global presence and global client demand, the event technology platform also is expanding its language set.

The company counts 3,300 employees, up from about 2,500 employees 12 months ago. Of those 3,300 staffers, 1,100 sit in technology development, said Aggarwal. "No one in the industry comes close to what we invest in R&D and product. We believe we invest literally 10 times more than anyone else in our space."

That's likely. Since being acquired by Vista Equity in late 2016 and immediately merging with Lanyon, Cvent has dominated the meetings and events tech space in nearly every measure: platform coverage, company size, company funds, customer portfolio. Yet the company faces challenges that call for an aggressive technology road map and major investments to get it right: merging the industry's two largest and most competitive technology stacks and client bases, plus building tight integrations for the smaller acquisitions Cvent has added to the platform over time. There's also the matter of what industry experts have called "ancient code" in Cvent's legacy platform that could hold the company back as newer, tech-forward players enter the field.

Flex Leads the Way

Cvent's leadership responded to these challenges last year, introducing new venue-search capabilities, as well as Flex, Cvent's suite of reimagined website-creation, registration and email tools. Billed as the company's largest-ever technology investment, Flex came into focus more fully this year after 12 months of beta testing with more than 1,200 early-adopter companies and 55,000 events planned. Now on version 4.0, according to product manager Nathan Chin, Flex will launch out of beta to the general client population in October.

Flex specifically is limited to website creation, registration and emails, "but hopefully it's a sign of things to come" as Cvent rolls out updated functionality across its platform and offers tighter integrations among separate modules, Chin said.

Flex offers a what-you-see-is-what-you-get approach to building a site. It requires no programming or coding knowledge and focuses on design, branding and ease of use with drag-and-

"The role of the meeting planner and hotelier has changed dramatically over the years from just planning and executing the event to measuring ROI, driving engagement, optimizing attendee experience and integrating marketing data and analytics. You almost have to be a technologist to be successful today in our industry."

—CVENT'S REGGIE AGGARWAL

drop widgets that show the organizer an instant display of how the website will look and respond to attendee users. It also draws key content through the process, minimizing data entry for users. Flex offers broad color palettes, various templates and the ability to upload images that will customize the look and feel of the site. Global design themes are easy to manage and allow the creator to establish brand standards but also to switch among compliant styles instantly throughout the site and immediately reflect the same changes in related email campaigns. The tool has a "save now, publish later" function that allows creators to build changes and content over time. Flex also will save past versions of the sites in order to document changes and allow creators to revert to previous designs. Flex sites are mobile responsive, and the tool will alert site creators to potential registration-flow problems as versions are published.

In October, Flex will become the default website-creation module for all Cvent users. "We will have the feature set 85 to 90 percent ready to go," said Chin. When users create an event from scratch, they will get a Flex template. However, clients will be able to store their legacy templates for about six months after Flex launches and to use them as required. All historic events themselves will be stored in the user's account, but the design templates will be retired after the six-month grace period. Chin said certain exceptions might come into play but all clients should migrate entirely to Flex in the next year.

More Platform Enhancements

While Flex was the marquee rollout at Cvent Connect, the company announced plenty of platform enhancements and outlined some of its longer-term vision:

OnArrival: The onsite registration and check-in technology, developed on an Apple operating system, is the fastest-growing product in the Cvent platform and is now available on Android. The Android version handles onsite check-in for previously registered attendees and soon will offer check-in for breakout sessions. Cvent will enable walk-in registration on Android in the first half of 2019.

One-Touch Pay: Apple Pay and Google Pay will integrate into Flex registration sites by the end of 2018. According to Cvent, 30 percent of registration site traffic comes through mobile devices, making mobile wallets a smart target. Cvent will not integrate mobile payment into any legacy registration tools.

CrowdCompass: Cvent updated the CrowdCompass mobile app with best practices to deliver content in line with the life cycle of the event. Navigation moved to the bottom of the home screen. Also, while home screen content prior to an event builds anticipation and helps attendees plan, home screen content during the event features activities for each day. After the event, the home screen recaps the user's experience and encourages feedback. The updated mobile app is available now.

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Chicago
November 6

Now in its fourth year, the Strategic Meetings Summit is a one-day conference series

designed to unite corporate travel managers, procurement/sourcing and senior level meeting executives and provide a platform for information sharing, the Strategic Meetings Summit series gives attendees insights and understanding of the policies, technologies, and management of a successful strategic meetings management program. Through expert-led sessions and interactive discussions, attendees receive actionable information to help them accelerate the development of an enterprise-wide meetings program and best practices to help increase visibility into meetings activity and risk across the entire organization of their company.

“Excellent summit – great subject matter, expert forums!”

Jeannine Strampel,
Procurement,
Global Meetings,
Congresses and Exhibits,
Merck

“I was a bit reluctant at first to attend, and cannot say enough good things about Strategic Meetings Summit. Its content was very propos; GDPR is on everyone’s mind. The creative format was engaging, not your boring slide presentation, and networking with like-minded planners and technology partners was especially useful. I left with key propositions and ideas I’d like to implement. And that’s success...”

Daniele Menache,
Managing Director,
Global Head of Events and Sponsorship,
Alliance Bernstein

“I’m so thankful that I took the time to attend the Strategic Meetings Summit. It was well worth the time out of the office to have the opportunity to network with many experts in the meetings industry, and the topics discussed were very relevant to the burning questions for today’s meeting management industry. I learned more than I expected! Thanks, BTN and sponsors. I look forward to more events like this going forward.”

Jodi Woods, Global Category Manager,
Travel and Card Corporate/Shared Services,
BD (Becton, Dickinson and Company)

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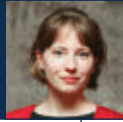
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DocuSign: This integration is designed to facilitate contracting. Users can upload all standard contracts and amendments and push documents to venues via DocuSign. The integration is available now.

Universal Appointments: Coming in the fourth quarter of 2018, Universal Appointments facilitates onsite meetings between event participants and onsite sales and marketing. View schedules, book times, see where the team is onsite and share what the meeting is about. It also allows onsite representatives to append participant profiles with comments and directions for appropriate follow-up. It enables marketers to benchmark appointment performance across shows.

Universal Lead Capture: Available now for early adopters, Universal Lead Capture integrates with badge companies and allows onsite marketers to capture data consent in a face-to-face environment, to qualify the leads and to normalize them into the marketing automation or customer relationship management tool.

Longer-Term Vision

Portals: A self-service, centralized solution for meetings and events stakeholders, Portals aims to scale meetings and events programs and take some of the heavy lifting off centralized meetings teams. The solution will launch in beta to early adopters this year. The first release will include five capabilities:

controlled access with permissions configurable per user, flexible request frameworks, an enterprise-wide event calendar for visibility, targeted reporting to different types of stakeholders and one-click access to sourcing for small meetings.

RFP-Free Small Meetings: Cvent is working with its hospitality supplier network to open meeting and sleeping room inventory for small, instant-book meetings. According to Aggarwal, suppliers are more willing to explore this opportunity than ever before. Cvent intends to get a beta product into the hands of early adopters in the next 12 months. The long-term vision is to remove the hotel RFP process entirely for simple events. This effort is separate from the newly acquired Kapow platform, which enables instant booking for unique offsite venues and event packages without sleeping rooms.

Advanced Event Analytics: Cvent will introduce four reporting concepts in the fourth quarter and continue to develop them into 2019 with additional data sets. Event Snapshot offers a standard set of event analytics and visualizations. Session Overview allows event organizers to understand their session mix, attrition rates, session arrival patterns and how speakers performed and to collect feedback on the content. Attendee Journey delivers information about individual attendee activities and engagements during the event. Event Insights will allow a customer to build the data

A Closer Look at Managing Simple Meetings

The managed travel and meetings industry seems to be getting on the same page about the concept of a “simple” meeting—and defining it: It requires a meeting space, it’s typically under 50 participants, it has easily replicable requirements and it might require sleeping rooms. According to a study produced by the Global Business Travel Association and Meeting Professionals International, it’s also a big chunk of an organization’s total number of meetings. How much, however, is hard to say.

The 408 travel managers and meetings professionals who responded to the GBTA/MPI survey estimated that simple meetings represent half their organizations’ total meetings volume—in terms of number, not total spend. Conventional industry wisdom sets that percentage somewhat higher, at perhaps 70 percent. “The challenge is that most companies just don’t know,” said HRS VP of meetings and groups Abbie Michaelson. “They can’t gather all the data from sales, marketing, [HR]—[from] all the divisions that have their own budgets and may have put these small meetings on a corporate card. There are likely a lot more.”

That lack of visibility largely is due to

the ways in which simple meetings are sourced. According to the study, 71 percent of respondents had corporate policies guiding the shopping and booking process for simple meetings. Among that group, two-thirds were required to compare multiple bids before placing their business. A much smaller percentage, however, had tools or partnerships in place to manage that process.

Fifty-six percent of respondents used a company-preferred meetings channel for venue shopping. Those channels included online meeting platforms, specialized venue-sourcing partners and full-service meetings management partners. The channels did not include corporate transient online booking tools or travel management companies or direct or indirect consumer channels like hotel websites or consumer online booking tools. Participation in managed channels dropped to 48 percent when making the booking, indicating that 8 percent opted out of their managed pathways, likely to book directly with a venue after the selection process and thus losing any benefit of automated or standardized data capture.

Plus, 44 percent of respondents never had

those tools or partnerships in the first place. Among this group, 77 percent defaulted to consumer channels to shop and book venues for simple meetings.

Study authors pointed to obvious problems that arise from using consumer channels for sourcing any type of corporate meeting, whether simple or complex. There’s difficulty in comparison shopping, risk in using nonpreferred or unvetted venues and data loss that impedes corporate duty of care and visibility into meetings volume and spend that could help forge deeper supplier partnerships.

Plenty of solutions key into this segment and have helped to define the concept of the simple meeting as a more commoditized, as opposed to customized, product. In addition to survey sponsor HRS, other players include Breather, Bizly, Groupize and Meetings-Booker. Most offer comparison shopping, digital RFP platforms, data capture, reporting and negotiation documentation between the prospective venues and the meeting organizer. Some offer their own designed and serviced meeting spaces. A few providers offer instant booking inventory or packages in hotel meeting spaces and offsite venues, which could negatively impact requirements to source competing bids. Some integrate corporate payment solutions to help companies further control the purse strings and lock in spend data. Whatever the flavor, these providers are positioning themselves as alternatives specifically configured for simple meetings, eschewing more established players like Cvent and Aventri, formerly Etouches, as over-engineered for the segment.

To that last point, fewer than a quarter of survey respondents used an online RFP tool for simple meetings sourcing and buying. An additional 12 percent said

points and visualizations he or she wants for an event and will offer advanced audience segmentation. These reports will be available in September with some of the data activated in marketing automation and CRM tools by the end of the year. Mobile app data will be activated in marketing and sales tools by 2019.

Analytics is the endgame for meetings and events as the industry proves its impact on organizations' and businesses' success. "The role of the meeting planner and hotelier has changed dramatically over the years from just planning and executing the event to measuring ROI, driving engagement, optimizing attendee experience and integrating marketing data and analytics. You almost have to be a technologist to be successful today in our industry," said Aggarwal.

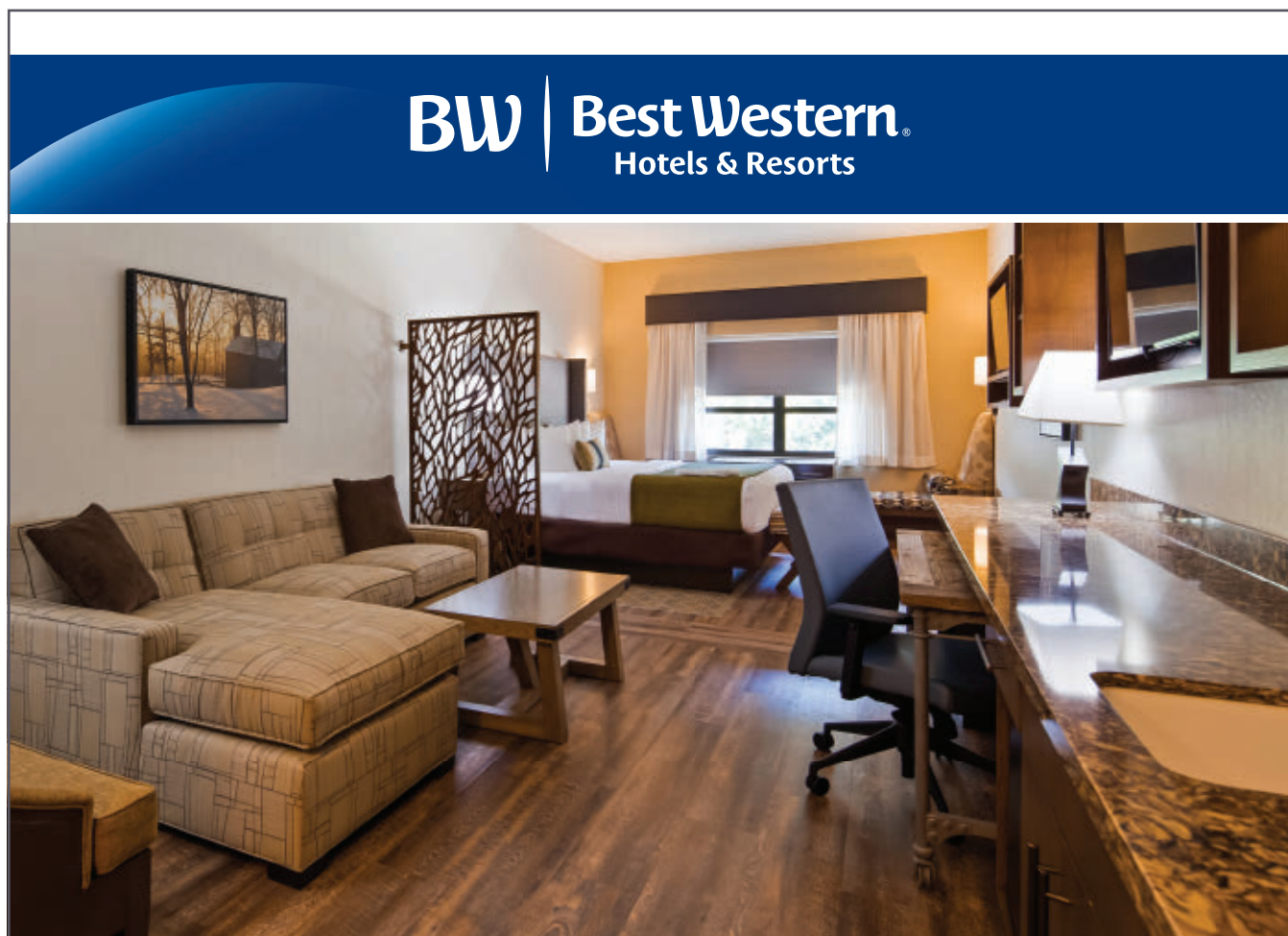
While Cvent was already pushing the industry in this direction prior to its acquisition, Vista Equity cemented that vision. To ensure success, Cvent is investing more in educating meeting planners, managers and marketers not only in how to use the tools and capture

their companies utilize such a platform but only for larger, more complex meetings and events. Fifteen percent have no meetings tool, but their companies plan to introduce one in the next 12 months. The survey did not ask what type of meetings platform respondents were using or what they would be introducing. Therefore, it provided no indication of whether specialized simple meetings platforms are gaining traction.

It does offer insights, however, into satisfaction rates among respondents who have some kind of meetings sourcing platform in place. "It comes to back to conversations I've had many times," said Michaelson: "They say, 'Even if I was interested in the platform, I wouldn't get adoption.' It's critical to note that 72 percent of respondents who use a meetings sourcing platform for simple meetings prefer this channel to any other. That's a vast majority, and it should signal an opportunity to put some rigor and consistency around how corporates are managing this segment." ■

the data but also in how to apply that data back to the business.

In his keynote address at Cvent Connect, Aggarwal said that beyond technology development and unification, the most important part of Cvent's investment strategy is the ability to "deliver more thought leadership and best practices" to the industry. As part of that push, Cvent will begin offering ROI workshops and a full suite of ROI tools this month to guide event planners and marketers in developing event ROI plans tailored to their organizations' business requirements. ■



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ARC Enables Alipay for ARC-Accredited Agency Transactions

Airlines Reporting Corp. now can process Alipay transactions made through ARC's 12,262 U.S. retail and corporate travel agency locations, satellite ticket printing offices and online travel agencies. The capability is made possible through UATP's existing partnership with Alipay, first signed in 2013, that enables airline and other travel partners like hotels and car rental companies to accept Alipay when travelers book directly on merchant websites. To date, UATP said, it has two airlines that are live with Alipay.

"As far as our systems are concerned, if an airline and agency agree to enable acceptance through that travel agency, it can be reported to us using the UATP solution to settle the transaction," said ARC managing director of airline services Chuck Fisher.

In 2011, ARC similarly enabled agencies to accept PayPal through UATP's PayPal partnership. Fisher said the channel has been "pretty quiet." Even so, he said, the company has "renewed our focus on alternative forms of payment." ARC is working to support payment network China UnionPay through a direct relationship, according to Fisher. UATP enabled China UnionPay in 2016 through a partnership with Planet Payment.

All Eyes on China

China has become the world's largest business travel market. It accounted for \$291.2 billion

\$261B

Chinese outbound tourism spend, according to the United Nations World Tourism Organization

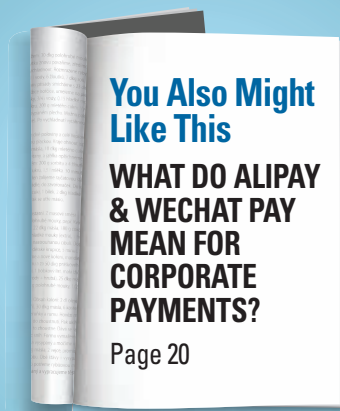
600M

Alipay users, according to the payment app

in spend in 2015, according to the Global Business Travel Association. Only 5 percent of Chinese business travel, however, is international. Chinese outbound tourism spend, meanwhile, is booming. It totaled \$261 billion in 2016, according to the United Nations World Tourism Organization. The U.S. was the sixth most popular destination in 2017 among Chinese outbound tourists.

The opportunity to capture those travel transactions is not lost on merchants, and many across the world have been working to enable Chinese tourists' preferred payment methods: Alipay and WeChat. As of March, Alipay claimed more than 600 million users. "As people from China travel to the U.S. they want to use their preferred payment method," said Chuck Fisher.

Alipay works somewhat similarly to PayPal. An Alipay user can link a credit or debit card, or transfer money from a bank account into the mobile app to pay for an item online or by scanning a quick response, or QR, code at participating merchants at the point of sale. ■



Certify Acquires Abacus & Its Real-Time Expense Reporting Tech

Certify has acquired expense management company Abacus for an undisclosed amount. Abacus joins expense tools ExpenseWatch, Nexonia and Tallie under Certify's management. Each company has maintained its own brand identity, as will Abacus, according to Certify founder and CEO Bob Neveu.

Certify was drawn to what Abacus calls its real-time expense reporting technology. Neveu described it as Abacus' ability to submit expenses as they come in, "an expense report without the expense report."

Abacus was one of the first companies to eliminate the expense report. Rather than requiring employees to submit expenses in batches associated with particular trips or time periods, the system submits each expense item individually as it comes in. Abacus retrieves details using optical

character recognition of the receipt, as well as geolocation, and it employs machine learning to categorize the expense and pair the receipt with a corporate card charge. Should a company choose, it can reimburse complete and compliant expenses automatically.

Other expense management firms, including Certify and Expensify, have since launched real-time expense reporting functionality—which automatically creates expense items, pairs credit card transactions with receipts and submits expenses for manager approval—but Neveu said Abacus remains "a game changer." While Certify's own expense reporting tool, ReportExecutive, creates expense items automatically, it groups and submits them on a scheduled basis—for example, on the first and 15th of every month—thereby maintaining the expense report concept. "In

Abacus," he explained, "if I take a picture on July 1st at 2 p.m., it goes to the manager at 2:01 p.m., [having gone through travel] policy and artificial intelligence," Neveu said.

Expensify branded the term Realtime Expense Reports in 2015, when it launched similar functionality. According to Expensify CEO David Barrett, RTER adoption was high among new companies, those not married to traditional expense processes. Established clients, however, tended to turn the setting off and revert to traditional, batched reports.

Neveu is aware that real-time expense reporting is not for everyone. "I'm not saying one system is better than the other," he said. "Some companies absolutely want a definitive report for a period of time, project or trip and don't want 50 expenses coming in individually. Others say, 'I don't care. Send them through, and we will handle as they come through.'" Now, Certify is in a position to offer both methods, he said.

Abacus—co-founded in 2013 by CEO Omar Qari, chief technology officer Josh Halickman and chief product officer Ted Power—has more than 1,000 corporate clients. Most have fewer than 500 employees, but clients also include, according to Neveu, marquee companies like file-hosting service Dropbox and automated email marketing platform MailChimp. ■



Blacklane Creates Flat Pricing for Airport Concierge Services

After acquiring airport concierge platform Solve last year, chauffeured service network Blacklane's platform now sells the arrival, departure and transfer services, which help travelers clear security, customs and immigration quickly and help with baggage handling.

They're available at more than 500 airports around the world for \$100 each, regardless of the airport, said co-founder and CEO Jens Wohltorf, and offerings are consistent across the footprint. "There are many legacy players around in this industry that serve a pretty impressive network of global locations, but pricing, as it was with the limousine industry, was not transparent," he said. "There's a lot of fine print and variation in the standards."

Flat pricing also will cut out many of the mark-ups implemented by aggregators, many of which increased the cost several times over, Wohltorf said. Travelers also can book lounge access in the networks for a flat \$50 per visit, he said.

Chauffeured service bookings are made through a separate section of the Blacklane site. Over the

coming months, Blacklane will integrate them, according to Wohltorf.

Blacklane Adds Sustainable Class

Blacklane also has added a ground transportation booking option: a green class on Tesla Model X and Model S electric vehicles. Blacklane plans to have launched in early August in Adelaide, Australia; Amsterdam; Auckland, Australia; Austin, Texas; Denver; Dublin; Edinburgh; Glasgow; Hong Kong; Honolulu; Lisbon; London; Milan; Montreal; Munich; Paris; Phoenix; Sydney; and Zurich.

Prices will be higher than Blacklane's standard business class, as they are oriented with the cost of the vehicles, Wohltorf said. "We see more and more corporate customers asking us about [sustainability] activities, and in tender materials, we see more and more paragraphs about carbon offsets and electric vehicles," he said. "It's a good thing for the world: the movement away from diesel- and fuel-powered cars into electric ones." ■

Delta & Air France-KLM Put Alitalia JV on Ice

Delta, Air France-KLM and Virgin Atlantic have excluded Alitalia in their U.S. Department of Transportation filing for an amended joint-venture agreement. They plan to consolidate Delta's partnerships with Air France-KLM and Virgin Atlantic into a single JV. Alitalia had been a part of the SkyTeam JV with Delta and Air France-KLM. "Alitalia is currently undergoing restructuring through the Italian bankruptcy process, and its future ownership structure is uncertain," the filing said. Among the complications, one of the JV's primary competitors could eventually hold a stake in Alitalia. Italian newspaper Il Giornale reported that Italy Transport Minister Danilo Toninelli aims for the government to own 51 percent of the carrier and private investors to own the rest. Lufthansa, which is in a competing transatlantic JV with United and Air Canada, remains a leading potential investor. ■

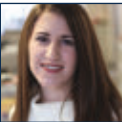
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The new power of payment





IHG Launches B2B Program for Small & Midsize Enterprises

InterContinental Hotels Group has launched a program aimed at the small and midsize enterprise market that moves beyond a simple discount.

IHG Business Edge will provide SMEs with, yes, a competitive discount on hotel rates worldwide but also the opportunity for their employees to achieve IHG Rewards Club's Gold Elite status after the first IHG Business Edge stay. An online sales service portal also will give SME travel buyers and arrangers access to stay reports and data and will connect them to an online networking community of other SME travel buyers from around the world.

IHG SVP of worldwide sales Derek DeCross said IHG Business Edge is built by SMEs for SMEs. IHG consulted with 2,000 individuals from 76 countries to understand what they're looking for from a hotel company's SME program. "Their view was that a discount program alone was

not compelling enough to drive their loyalty engagement," DeCross said. "What they were really looking for was a partner that understood the small business and could provide them with meaningful resources and content that they couldn't get on their own. They also felt isolated and wanted networking opportunities with organizations that looked like their own and faced similar challenges."

IHG piloted with 300 accounts from 17 countries beginning in December 2016 and now is launching the program formally. At the start of August, prior to formal announcements and marketing, IHG Business Edge had 1,300 SMEs signed on.

IHG Business Edge is limited to legal corporate entities that plan to spend at least \$5,000 with IHG annually. IHG said the program won't be limited to transient travel and expects to integrate it with other B2B services like its meetings program. ■

Marriott Rewards & SPG Unite Aug. 18

Starting on Aug. 18, Marriott Rewards, Starwood Preferred Guest and The Ritz Carlton Rewards will operate as one, with one set of unified benefits and one rewards currency across Marriott's 29 brands.

In April, Marriott International announced August as the month its loyalty programs would combine after Marriott acquired Starwood Hotels & Resorts, but now it's nailed down a precise date for the event.

The morning of Aug. 18, the company's sites and apps will be down intermittently as Marriott migrates its systems to a single platform. The migration will interrupt customers' ability to book online and redeem points through rewards membership. Marriott recommends customers book in advance of Aug. 18 or wait until later in the day.

Once the programs are merged, each SPG member will receive a nine-digit account number consistent with the new system, as will some Marriott Rewards members. Passwords will remain the same.

The merged platform will feature the ability to earn more points, redeem points in more places and earn elite status faster. There will be no blackout dates, and SPG Starpoints balances will triple. ■

Airbnb for Work Listings Will Flow into Concur

BY ELIZABETH WEST

Airbnb and Concur have been TripLink buddies since 2014. Plus, the homesharing site has fed expense data directly to Concur since the same year. Since last summer, however, the two companies have been working on a deeper partnership: integrating Airbnb listings into the Concur booking platform.

Announced in July 2017, the partnership will bear fruit this month. Airbnb listings will appear alongside traditional lodging content. Properties flowing into Concur will meet Airbnb for Work criteria, which means they must be an entire home or a private room with ensuite or private bath. They also must include amenities like Wi-Fi, a workspace and, as of last month, a smoke detector. Hosts must maintain an Airbnb rating of 4.8 or higher over the previous 12 months. They also must have responded within 24 hours to 90 percent of booking requests and must offer a moderate or flexible cancellation policy.

"Companies have a number of use cases for Airbnb bookings: tight inventory during major conventions and events, low-cost alternatives in higher-priced markets, more convenient locations or nonstandard stays where a small group might want to stay together. There are lots of long-tail

examples, including business trips with a leisure component," said SAP Concur chief product officer and EVP Tim MacDonald. "We've seen significant growth in Airbnb bookings via our TripLink connection and in the data coming through expense reports. It was clearly an integration that was right for our customers."

Sixty-three percent of SAP Concur's Fortune 500 customers expensed Airbnb stays in 2017, according to the company. Overall, SAP Concur clients using the homesharing platform increased 42 percent from 2016 to 2017. The U.S. saw the highest percentage of Airbnb bookings, according to Concur expense data. Growth has spread globally with an 85 percent increase in Airbnb bookings in Asia/Pacific and a 65 percent increase in Europe and the Middle East.

SAP Concur expense data supports MacDonald's use case examples; there were quarterly spikes around events in certain cities like Austin's South by Southwest, and 56 percent of Airbnb business travel bookings included a weekend stay in 2017.

SAP Concur clients can choose to expose Airbnb content in the tools or not, MacDonald said. They don't have to be formal Airbnb for Work clients to take advantage. "All clients can have access to the content if they want it."

The Concur booking tool displays ratings, reviews and other critical information so travelers can make informed decisions. The process, however, takes travelers out of the Concur tool and into Airbnb to complete the booking. The data automatically ports back into Concur to merge with other itinerary details and for travel reporting. ■

Most Popular Cities for Airbnb Business Travel Bookings



London



San Francisco

Source: Concur expense data

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American Gives Travel Management Companies an Out for Basic Economy Buyer's Remorse

BY JAY BOEHMER

Highly restrictive basic economy fares from the three largest U.S. airlines have challenged corporate travel programs. These fares, which have proliferated across airline networks to compete with no-frills carriers, can be tempting for their affordability. Yet, all those basic economy ticket restrictions can be a big turn-off for corporate travelers.

Last month, American Airlines posted a new exchange procedure for travel agencies whose clients have buyer's remorse. Previously, agencies had to contact American's reservations department to get a waiver to exchange a Basic Economy ticket. Now, they can process their own exchanges without contacting reservations.

American's policy is more forgiving than competitors' by giving an out beyond the standard 24-hour cancellation grace period after purchase. The gist of American's policy, as articulated in a document for agencies issued July 3: If a ticketholder decides Basic Economy is not the right ticket after purchase, he or she can apply what was spent to another economy ticket on the same flight until 24 hours before departure. The new procedure extends to agencies accredited by ARC or by the International Air Transport Association and applies to domestic and international routes.

While each airline has its own no-frills flavor, basic economy ticketholders can face restrictions on seat selection, boarding priority, upgrades, flight changes and frequent-flier perks. Some even restrict carry-on bag allowances. Given all those restrictions, many corporate travel programs have suppressed the availability of basic economy in the channels they command.

Already, American, Delta and United have urged third-party sellers to clearly warn would-be purchasers at the point of sale of all the conditions these fares include. An American official noted that buyouts, which the new agency procedure makes easier to process, haven't been too common "because the disclosures for Basic Economy are quite clear and we do our best to make sure everyone understands exactly what they are buying."

American's exception policy has some caveats, according to the policy document. The buyout must be processed more than 24 hours before departure. The itinerary must remain the same, meaning the same flight, date and time as originally ticketed. A change fee does not apply, but travelers can book only into a main cabin economy ticket—no premium economy or above allowed.

Post-purchase policies for basic economy fares from Delta and United are not

as lenient. Each provides a 24-hour grace period for bookers to cancel without penalty, as required under U.S. regulations. Further, United noted, "If a customer accidentally purchases a [Basic Economy] fare, they can easily correct the mistake by calling United Customer Care."

Meanwhile, Delta this spring eased Basic Economy seat selection restrictions, allowing a ticketholder on domestic flights to select and purchase a seat assignment "seven days from departure until 24 hours prior to departure," according to an airline official. Previously, ticketholders would be assigned a seat only after check-in. ■

American Will End Basic Economy Carry-On Restrictions

American Airlines will remove the carry-on restriction from its Basic Economy fares later this year to make them more competitive. While chairman and CEO Doug Parker said American has been "very happy with the results" of the Basic Economy fare it launched in early 2017, the carry-on restriction has put American at a disadvantage in markets where it competes with Delta, which has a similar fare without the restriction. "There are filters for things like Google [Flights] search that ask if you want to bring a carry-on, and all of a sudden, American flights don't show up as highly as before because it adds \$20 to the fare," he said. "We've gotten to the point where the right thing to do is to get in line with the competition."

The change will apply to flights on and after Sept. 5, after which United will be the only major U.S. carrier with basic economy carry-on restrictions. Networkwide Basic Economy fares remain central to American's plans, president Robert Isom said. The carrier expanded Basic Economy to its transatlantic flights during the second quarter, though those fares already are free of carry-on restrictions.

More than 60 percent of American Airlines travelers overall opt to buy into higher fare classes when offered Basic Economy, Isom said. Corporate travel programs particularly have eschewed Basic Economy due to other restrictions including no seat selection and no cancellations or changes.

—Michael B. Baker

CONTINUED FROM FRONT PAGE

Amex GBT & HRG: What's Next

both together so we end up with one plus one equaling three or four or five."

Anderson spoke about integration and next steps:

Timing

How long does a complex integration of the people, systems and operations of two large, multinational organizations take? Anderson wouldn't commit, saying only: "It will not be done in 2018, but I think there will be visible changes in the organization and our face to the market that will be visible immediately. This will take some time. I'm not going to put a date on it."

Technology

Each of these TMCs operates a variety of technologies—internal tech stacks to carry on their daily operations, as well as client-facing technologies in the realm of mobile, data reporting and booking. A common theme in Anderson's remarks was "best of both," and that applies to technology. "Already, company leaders have undertaken a technology review," he said. "We intend to harmonize or consolidate onto best-of-both platforms for front office, mid-office, back office on the internal and operating side and also on our client-facing technology. The longest time line of activity will be around the products and technology because we're

deployed in the field with independent technology stacks." He continued: "As we make those decisions, we'll be in communication with clients, making sure that they're comfortable with any changes we want to make. Our objective is to offer up a set of solutions and services that are as good as or better than what they have today."

People

When the deal went public in February, Amex GBT estimated that job cuts would decrease the combined workforce by 6 percent to 8 percent once fully combined. "We're in a growing environment right now with strong client retention, so we will lean, I believe,

CONTINUED ON PAGE 38

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toward the lower end of that range or maybe slightly lower than the lower end of that range,” Anderson said. For the 12 months ending March 31, 2017, HRG employed an average of 4,360 people per month, according to its most recent annual report. Amex GBT, meanwhile, has stated it employs around 12,000.

Asked what employee groups are most likely to see cuts, Anderson said support areas: “not areas that support clients but areas that support functions and infrastructure.” He gave accounting as one example: “When you think about supporting the accounting system, we’ll move to a single suite of back-office technology to support accounting and other functions and we’ll need to support one rather than two systems. That’s where some of those reductions will come in, and you can think about similar opportunities across other support areas. We’ll also have some opportunities where we have overlapping client management.”

Meanwhile, Amex GBT has lined up a senior management team, said Anderson, as well as the next level down. Prior to the deal’s completion, the company hadn’t “been able to make formal job offers. But we have had those discussions and do know who is going to be in those permanent roles in the first two levels of the organization.”

Geographic Reach

Expanded geographic presence was among the rationales for the deal. Amex GBT picks up a few new wholly owned locations, while the combined network opens up several new wholly owned locations for HRG clients in the long run. They number by the handful, not by the dozen, said Anderson. “Our geographic footprint will expand,” he said. “We have proprietary business in some markets where HRG today has partners, and HRG has proprietary business in some markets where we have partners.” Anderson further noted that in markets that rely on affiliate partners, the combined company will explore “where it might make sense to take equity or ownership” and bring on additional wholly owned locations.

In addition, Amex GBT strengthens its presence in multiple markets: “HRG is bigger than we are in Canada, for example,” he said. “We’re bigger than they are in the U.S. There is complementary scale in several markets in Europe.”

New Distribution Capability

Amex GBT has espoused a view that NDC stands for “not direct connect,” highlighting its preference for global distribution system-based distribution, not one-off application programming interface connections to individual carriers. HRG, on the other hand, has demonstrated at least some desire to hook in content directly from airlines. The International Air Transport Association has certified the latter as a Level 3 New Distribution Capability-certified travel seller.

“The rich content that the airlines want and are starting to distribute under the NDC initiative is an area that GBT has been interested in pursuing,” said Anderson. “HRG is farther along the path on NDC, but our strategy around NDC is highly complementary. We’re working hard and will continue to work hard to give clients access to full content regardless of source. We’ve both invested in channels to drive omnichannel platforms.”

Amex GBT’s multisource content-aggregation system is called Content Hub. HRG’s is called OneView. HRG’s website describes OneView as a content solution that “will enable us to access NDC content across GDS, aggregator and direct channels and ensures that customers have more choice while offering our suppliers more channels to market.”

Where HRG already enables direct connections with airlines for individual clients, “we’ll continue to support those relationships and support those clients. We’re not going to walk away

Amex GBT’s Focuses for Assimilation



Optimizing the combined global footprint



Meshing the tech Stacks



Culling redundant staff

from those client commitments.”

Anderson also noted: “As is the case with the other technology investments, we’ll pursue a best-of-both strategy around NDC. On the back of HRG’s work around NDC, I can see us accelerating our adoption going forward on a combined basis. That is separate and distinct from direct connect.”

Branding

A “work stream” is underway around future branding of the combined organization, said Anderson. Don’t expect the HRG name to go away immediately. “The HRG brand and logo will continue to exist, and it will be underpinned with a tagline: ‘This is an American Express Global Business Travel company,’” he said. “We’ll leave the HRG brand in place for the foreseeable future.” Beyond that, “we’ll be looking at brand strategy going forward as we work through this integration.”

Messaging to Clients

HRG and Amex GBT come together each with its own set of client relationships, contracts and obligations. “They will see no change initially,” Anderson said of current clients. “We’ll focus keenly on delivering business-as-usual service in both organizations. We want to retain our clients, and both companies have high retention rates in previous years and year-to-date this year. As we start to harmonize technology, we’ll have discussions with clients around changing platforms where it makes sense.”

Supplier Relations

Amex GBT’s and HRG’s combined travel transaction value is unrivaled by any other TMC. “Our scale will deepen our relationships with our supplier base,” said Anderson. He said Amex GBT vet Mike Qualantone will continue to run supplier relations for the combined company. “We’ll be working hard to bring added value to the supplier base,” said Anderson. Exactly when Amex GBT renegotiates with hotels, airlines and others on contracts “will more or less line up with existing contract terms, but we’re looking at that as an opportunity for our supplier partners to deepen their reach and distribution across the client base.” ■

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Airlines Respond to Rising Fuel Costs with Higher Fares & Capacity Control

BY MICHAEL B. BAKER

Airlines are eyeing fare hikes and capacity cuts as remedies to rising fuel costs, executives from major North American carriers indicated in second-quarter earnings calls. Oil prices per barrel have been moving up steadily this year, hovering around the \$70 mark at the end of July, which was nearly 40 percent higher than a year earlier. As such, carriers saw significantly higher costs and lower profits in the second quarter.

Delta, which saw its fuel costs rise about \$600 million year over year during the quarter, reported some success in pushing fares up so far this year. CEO Ed Bastian said pricing at the close of the second quarter rose about 4 percent year over year, and second-quarter yields were up year over year, including a 2.5 percent increase in domestic yield and an 11.1 percent increase in transatlantic yield.

The carrier now is focused on pushing up corporate airfares, which have recovered only 20 percent of the declines seen since they peaked in 2014, Delta president Glen Hauenstein said. "While we saw sequential improvements in corporate yields within each of the three months in the second quarter, we still see great opportunity and momentum as we continue to work every day to recapture the cost of higher fuel," he said.

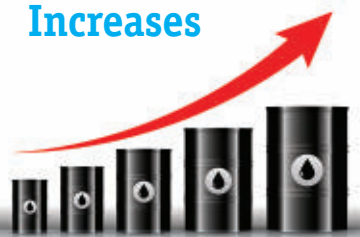
Similarly, Air Canada CEO Calin Rovinescu said fare increases were part of its plans to offset the carrier's rising fuel costs.

In the coming months, carriers also will reduce or eliminate service on routes that are not generating strong profits. Many have significantly scaled back their capacity plans for the year. Alaska Airlines cut its 2019 capacity growth plans from about 4 percent to 2 percent, though it expects that will return to 4 percent in 2020. Chief commercial officer and EVP Andrew Harrison said the carrier will be "focusing on our strength on the West Coast" and reducing redeye service and also cutting back on some of the legacy Virgin America network. "We expect to reap the benefit of the new markets we launched in 2017 and 2018 as they mature and expect to add only a handful of new markets in 2019," Harrison said.

American Airlines lowered its third-quarter capacity growth by 0.6 percentage points to 3.3 percent and has lowered its fourth-quarter growth by 1 percentage point to 1.6 percent. Cuts include reductions in routes to China and Brazil, president Robert Isom said. American also has deferred some aircraft deliveries, including spreading out the time line for 22 Airbus A321neos that were slated to be delivered between 2019 and 2021. That will reduce costs by about \$1.2 billion over that period.

JetBlue will end service on "poorly performing routes," in particular flights during off-peak periods in markets where JetBlue has multiple frequencies, EVP of commercial and planning Marty St. George said. It also will pull back

Q2 YOY Fuel Cost Increases



JetBlue
51.1%

Alaska Airlines
38%

United
35%

Delta
32%

Air Canada
30.9%

WestJet
30.6%

Southwest
17.4%

on capacity on flights within the Western U.S. and focus more on transcontinental routes and routes out of Boston and Fort Lauderdale, Fla., where the carrier still "has a lot of room to grow," he said.

JetBlue has cut 2 percentage points of projected capacity growth for the fourth quarter. The carrier expects total 2018 capacity will have risen between 6.5 percent and 7.5 percent year over year. Service disruptions last fall during the particularly destructive hurricane season of 2017 are skewing the numbers somewhat; capacity in the third quarter is expected to be up between 7.5 percent and 9.5 percent year over year.

Although United Airlines is in growth mode on domestic routes, building up service out of its hubs to smaller markets to make up from cuts in years prior, it will cut capacity where necessary to make up fuel costs, president Scott Kirby said. United made up about 75 percent of the extra fuel costs during the second quarter through higher revenue and cost controls, he said.

WestJet reported its first quarterly loss in 13 years in the second quarter thanks to higher fuel costs, along with tougher competition and threats of a pilot strike during the quarter. Facing those challenges, the Canadian carrier has reduced planned fourth-quarter capacity growth on WestJet and Encore by 6 percentage points. For the full year, WestJet projects its capacity will be up year over year by between 5.5 percent and 6.5 percent, down from its earlier projection of 6.5 percent to 8.5 percent.

Thanks to a fuel hedging strategy, Southwest Airlines took the lightest hit in fuel cost increases among the largest U.S. carriers in the second quarter. "While we're never happy about higher fuel prices, the successful implementation of our strategic initiatives over the past few years has prepared us well for the 40 percent year-over-year increase in market prices," CFO and EVP Tammy Romo said. "With hedging losses well behind us and a strong hedge in place for this year, as well as next, we are well-positioned to manage through fuel price headwinds." ■

New Delta Reporting Metrics

BY MICHAEL B. BAKER

Delta is adding two reporting metrics. Trip fulfillment factor and trip on-time factor use FlightStats data to show, for any given city pair originating in North America, how often flights made it to their destinations and how often they arrived on time. The data includes both nonstop itineraries and flights with connections. Delta provides

the reporting not only for its own flights and those of its regional carrier partners but also for United, American, Alaska and Southwest.

"Our feedback was that systemwide [data] was really great, but: 'Show me the performance in markets we actually fly,'" said Delta sales technology general manager Will Strattnr. "As

good as the government report data sources are for delays and completion factors, those are at the leg only, so the metrics are not sufficient."

The carrier has been providing the data to select corporate clients in a pilot program and on July 31 began expanding the reporting to all corporate customers, VP of sales operations and development Kristen Shovlin said. That will occur "over the summer and beyond. We want to walk them through it and make sure that they really understand all the data behind it."

The data will be available through companies' sales account managers and eventually via the Delta Pro travel management portal. Delta also is working to include flights with origins outside North America, as well as codeshare flights. ■



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Michelle (Mick) Lee
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A Letter of Gratitude from WINIT Founder + President, Michelle (Mick) Lee

In 2013, I approached respected colleagues about creating a network focused on diversity to change the statistics of women on stage at events and at executive levels in the hospitality industry. And so WINIT began. These women and men jumped in with both feet and dedicated time, resources and funding to fuel our mission. We launched in 2014 and have evolved to a movement of 3,000+ strong in over 45 countries with a powerful list of Donors and Partners. The WINIT Core team was identified to manage the programs, services, and community of 200+ volunteers and dedicated Advisory board members. This extended network of engaged activists walk the talk, embracing diversity and inclusion into their lives and work every day.

At WINIT, you leave your title at the door; everyone has a voice and a perspective from which we can learn. WINIT has progressed because our volunteers challenged us and provided guidance along the way.

As we relaunch as WINIT For Women, I felt it important to acknowledge the incredible leaders, including BTN, who have helped bring us to where we are today. I encourage you to read about them on our website and watch for a special announcement the week of August 13th!

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What Goes into Flight Disruption Compensation

BY DAWIT HABTEMARIAM

“This is something that’s been a blind spot for companies, and they are just happy to find new, virgin savings,” said Mads Pedersen, sales director of PaxFour, a firm that helps companies claim compensation for flight disruptions. Pedersen was referring to the European Union’s Flight Compensation Regulation EC 261/2004, a 14-year-old statute that entitles any air passenger to compensation, as much as 600 euros cash, from an operating airline for a cancellation, denied boarding or delay over three hours.

In June, travel management company network GlobalStar partnered with PaxFour to help clients capitalize on these untapped savings. “Over the years, the money has been left there untouched. We wanted to do something for clients, especially [because as their] travel programs became more mature, the opportunities to drive deeper savings are becoming fewer,” said GlobalStar VP of global sales and services Chris Weedon.

EC 261/2004 applies to disruptions from technical issues caused by the airline but not to disruptions that fall outside the airline’s control, such as extreme weather conditions and civil unrest. Flights that fall under the regulation are those that originate and/or end in the EU; flights that end in the EU must be operated by an EU-based airline, but any airline taking off from an EU country is subject to these rules. In the U.S., no laws entitle passengers to compensation for flight delays and cancellations, but U.S. citizens are eligible when flying on flights that fall under the regulation.

“From a corporate perspective, I don’t think corporate clients have really understood how well their travelers, or even if their travelers, have been claiming compensation and where they stand on being able to claim on behalf of the individual,” said Nicole Wilcock, senior director of global implementation, client technology and product for Radius Travel, which partnered with PaxFour in July.

Claiming Compensation

To claim compensation, a traveler can fill out the airline’s online form, e-mail the relevant contact at the carrier or fill out and send the EU’s complaint form to the airline. Depending on the airline, processing could involve a lot of e-mails and drag out over as long as two months. An airline might respond at a glacial pace, push back by citing previous court verdicts, cite an EU country’s local legislation or claim that the disruption was out of its control. The airline also may offer a voucher or compensation that is less than what the claimant believes he or she is entitled to.

If the traveler is unhappy with the airline’s judgment, he or she can appeal to the country’s national enforcement body to arbitrate, but the decision is not binding. The traveler can take the issue to an EU small claims court in the airline’s registered country, the country of arrival or the country of departure; in most EU countries, the statute of limitations is three years after a disruption. “The process can be onerous for a corporate client who has thousands of these a year,” said Wilcock.

Flight Disruption Compensation Service Providers

Some TMCs manage the compensation process for their clients. Reed & Mackay has provided such services for over 10 years. Its agents notify clients after rebookings and request approval to conduct the compensation process on their behalf. Nine times out of 10 the traveler will approve the request, said commercial director Tom Rigby. If the process drags out, he said, Reed & Mackay can leverage its relationship with the airline to expedite a decision.

AirHelp, Service and PaxFour are among companies that specialize in managing the flight disruption compensation process and take a cut of the funds retrieved. They leverage their knowledge of passenger rights and regulations and use flight data to spot disruptions eligible for compensation. “When it comes to rights and laws, it comes down to proof,” AirHelp VP of

product Johnny Quach said. “You need to prove the flight delay was the airline’s fault.” And the proof, he said, is in the data. “We have most of the flight data in the world, so we know which flights are eligible and which are not.”

PaxFour analyzes a client’s travel data against its database of known delays, cancellations and missed connections to find disruptions eligible for compensation. If it spots an opportunity, PaxFour reaches out to the affected employee, obtains power of attorney from him or her and takes over the process, including the legal proceedings. Paxfour gives the compensation to the traveler’s company.

Who Should Receive Compensation for Business Trips?

Some companies’ travel policies state that employees should give the compensation back to their companies because their companies paid for the tickets. The EU regulation, however, entitles only the passenger to compensation. “According to the law, it’s the passenger who is entitled to the money,” said AirHelp chief legal officer Christian Nielsen.

PaxFour is able to give compensation to a traveler’s employer via power of attorney. The employee signs off once, and it applies both to the current claim and to future ones, according to Pedersen. The CFO’s perspective, he said, is that the disruption “would be inconvenient for the traveler but not a financial loss. ... [Companies] suffer direct financial loss whenever employees are just sitting on their behinds in the airport.” Travelers run up food, transportation and beverage expenses during the disruption, he said. Travelers may not find the issue so cut and dry. What about flights delayed into a weekend or after business hours? Corporate policies around disruption compensation may need to accommodate such nuances.

AirHelp’s approach differs. “It’s an individual right to compensation for your personal suffering, but you as a person with an entitlement to some money can decide if you want to give some of that money or all of it to your company,” Nielsen said. “That’s a discussion between an employee and an employer.”

In the U.S., whether the traveler or company gets the compensation depends on the form of compensation the airline offers, according to Service CEO Michael Schneider. If it’s frequent-flier miles, it will go into a traveler’s account. If it’s a voucher, the companies tend to use it toward future discounts on their air travel. ■

< 1/4

of passengers on disrupted flights file a claim, according to AirHelp, which surveyed 2,062 U.S. citizens about their knowledge of passenger rights. Those who did not file claims when they could have were asked to cite their top reasons:

- 63 percent were not aware of their rights.
- 47 percent did not think they were eligible for compensation.
- 42 percent did not know how to file a claim.

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Paul English Replaces Himself as Lola CEO & Updates Product

BY ELIZABETH WEST

After pivoting to the corporate market over a year ago, mobile travel booking and concierge tool Lola, founded by Kayak co-founder and former chief technology officer Paul English, remains a hyperlocal player; the majority of its clients are in the company's Boston vicinity. Despite its limited client base, the company is well-funded and the technology platform itself is growing. English brought in Mike Volpe, chief marketing officer of cybersecurity startup Cybereason, on Aug. 1 as CEO to grow Lola's sales and marketing operation and drive customer acquisition. English has shifted his role to chief technology officer, the same position he held at Kayak.

He called Volpe "the best B2B marketer not only in Boston but in the country" and told BTN English himself needs to be where he excels: in product development and engineering. "At my other companies, I've always had a strong partner on the business side, and I think it's time to do that at Lola," he said, noting that he wasn't originally in the market for a new CEO but recognized the fit right away when he met with Volpe.

Product Updates

In the meantime, Lola continues to roll out features and has integrated payment solutions and expense providers, putting more T&E management power into the hands of corporates that have as few as 20 employees.

Building on the mobile booking and concierge app, which offers simple price- and threshold-based policy configuration, Lola has launched a desktop app. Lola also now offers a Book on Behalf option, enabling administrators and coworkers to book travel for any other colleague and, through the mobile app, to transfer to the traveler all the itinerary details, travel reminder features and the ability to cancel or change the booking within the Lola tools. "A lot of times with other tools, the person who books the travel has to keep control of changes and the traveler might get email or text notifications but doesn't get all the functionality," said English. "The experience through Lola is almost exactly the same whether you book for yourself or someone else books for you."

Lola also has simplified the payment and expense process, building in an option to register a centralized corporate card. "Some companies may have young employees who don't have their own credit or, because of having to pay expenses upfront, don't want to put travel purchases on their corporate card,"

"At my other companies, I've always had a strong partner on the business side, and I think it's time to do that at Lola."

—LOLA'S PAUL ENGLISH

said English. However, he also underscored that the road warriors Lola targets always want to leverage their options. "Often, they want to get the points on their personal cards."

The other thing centralized integrated payment offers, though, is efficient expense reporting; travelers need not keep receipts or manage air or hotel charges through an expense process. To further streamline the process, Lola has integrated with Expensify, based on customer demand. English told BTN the company already had a loose integration with Concur that would tighten up in the coming months and that Lola wants to be like Uber or Lyft in its expense relationships, with the ability to send data seamlessly to multiple providers.

As the company builds its corporate travel ecosystem and its sales and marketing operations, commercial terms are likely around the corner, as well. So far, Lola has been free to corporations, including the 24/7 concierge service that clients adore. It relies somewhat on hotel commissions right now but mostly on its nearly \$45 million in venture capital to build the business. English predicted Lola could be booming soon, with a major partnership around the corner. "We have 12 agents based in Boston right now. Later this summer we will announce a partnership with a company that has thousands of agents who we'll train to use Lola," said English. "As we scale up our marketing, we're not going to need to hire hundreds of our own people but we can rely on a partner with thousands of agents to scale up for us."

English demurred when asked to elaborate. No matter who the partner may be, Lola branding and experience will remain, he confirmed. "That will stay 100 percent intact." ■

Tripbam Launches Benchmarking Tool

BY JULIE SICKEL

Hotel rate shopping and analytics provider Tripbam has launched a benchmarking tool that, among other capabilities, allows travel managers to evaluate how accurately hotels, brands and chains apply rate discounts and last room availability. Tripbam founder and CEO Steve Reynolds said the aim is to help travel managers be more receptive to long-term dynamic dis-

counts and "avoid the annual RFP dance."

In recent years, both corporates and hoteliers have discussed shifting from an annual RFP season with static rates at some or all preferred properties to a dynamic rate program with a set discount off the best available rate at a property at the time of booking. A major sticking point, though, has been the lack of trans-

parency around dynamic rates. Reynolds said giving corporates confidence that they're actually getting the correct discount off the correct rate could "go a long way" in making the dynamic shift happen.

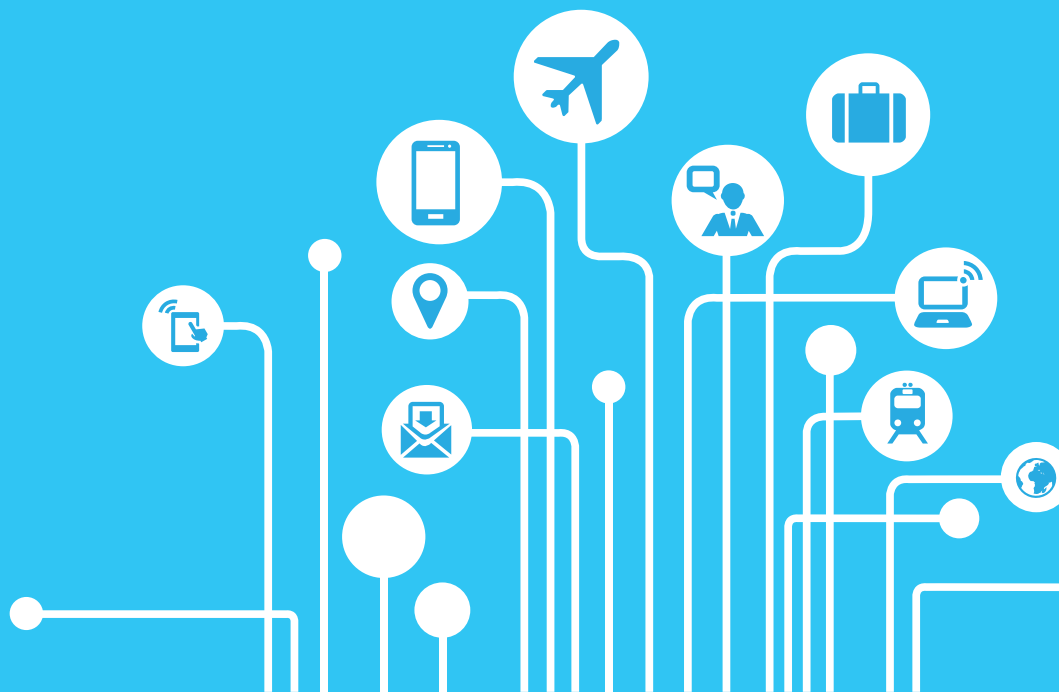
Tripbam Benchmarking also enables a travel manager to measure the value of a managed hotel program against companies of similar size, to evaluate chainwide dynamic rate discount performance, to identify hotels where a greater share of room nights is needed to meet contractual obligations, to source hotels to supplement a program or replace underperforming properties and to identify, by property, savings lost due to LRA issues.

The tool is available to all Tripbam clients for free in 2018 and at an upgraded subscription cost beginning in 2019. ■

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Deem Enters the Fray for Small & Midsize Enterprises

BY ELIZABETH WEST

Deem launched two versions of a new travel booking and "lite" management suite aimed at the small and midsize enterprise segment. Deem Emerge targets the corporate directly with mobile and desktop booking tools, self-service policy configuration and easy onboarding. Deem Rise targets travel management companies with a technology-first, white-label solution that offers the same functionality. Emerge aims to enable agencies to go after SMEs by reducing high-cost personnel resources required to serve the segment.

With the new tech, Deem is entering a suddenly crowded market of travel booking tool and service providers reaching out to once may have been considered too small to engage. Startups like Lola, TravelBank, TripActions and Upside started the lite travel management ball rolling; it has only picked up momentum as traditional players like Carlson Wagonlit Travel, Concur and Corporate Traveler have jumped into the mix. New Zealand-based Serko is similarly selling its SME-oriented Zeno technology to the agency market in North

America, as well as going direct to corporates.

Deem CEO, COO and president John Rizzo suggested that Deem's new offerings still fill a gap, particularly for agencies looking to tap into smaller markets and keep the business in house, he said, calling out the Concur Hipmunk model as a concern for agencies.

"We've gotten feedback from TMC partners that the midmarket is an untapped opportunity for them," said Rizzo. "At that same time, while that market is opening, there's some trepidation. ... They'd like another alternative, beyond Concur Hipmunk, that allows efficient onboarding and also allows agencies to build on additional services and sophistication as these smaller clients grow into bigger clients."

That's the differentiator Deem Rise brings to the market, according to Rizzo. Rise is built as a part of Deem's enterprise solution, which means there's just one set of pipes for TMC partners to install and no need to reimplement back-end technology as small clients grow. Rizzo also touted Deem's mobile-first strategy, its full integration with desktop tools and its

overall open expense integration strategy, which holds for both the Rise and the Emerge products. Rise launches with four agency partners: Acendas Travel, Campbell Travel, Direct Travel and Ovation. All of these already resell Deem's enterprise solution.

Emerge is built on the same platform as Rise but is branded as a Deem product and marketed directly to corporates. Emerge serves content from Google, Sabre and Travelport and offers personalized search results based on integrated corporate spend guidelines and user preferences. Deem Emerge uses a TMC partner for fulfillment services.

Rizzo also underscored that Deem isn't starting from zero with its new products. Rather, he said, they are based on a custom tool Deem built about three years ago for Enterprise Holdings, the parent company of Enterprise and National, to support smaller, lightly managed travel programs among the car rental company's client base. That tool, Rizzo said, has served nearly 47,000 users to date and offered the proof Deem needed to launch a broader SME play. "We know it works, and we know we can scale," said Rizzo. "The managed travel market has always been very competitive. That's nothing new." ■

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Car Rental Company Apps Side by Side

Car rental companies' mobile apps have played a key role as these suppliers have strived to make the check-out and vehicle-selection process simpler. Here's a look at the apps of the three largest U.S. corporate car rental suppliers.

	Avis	Hertz	National
Bookings as of July 1, 2018	1.5 million rentals through the app since its inception in July 2016. Mobile app transactions are up 83 percent year over year.	Hertz declined to release.	The exact number is not available, but reservation growth is up 30 percent year over year, & more than 15 percent of monthly reservations come from the app.
Users as of July 1, 2018	400,000 unique customers have used the app.	Hertz declined to release.	National declined to release.
Vehicle selection	Travelers choose a car at pickup from images based on make, model, color and mileage. A welcome message follows with a vehicle assignment & parking space number so the traveler can bypass the counter.	Ultimate Choice vehicle selection, available in about 60 locations, allows travelers to select cars in person.	Eligible Emerald Club members can scan & secure vehicles in person using Emerald Aisle. At locations where Emerald Aisle is not available, users can select vehicles prior to pickup using Virtual Aisle.
Other capabilities	<ul style="list-style-type: none"> • Track Avis shuttles • Lock & unlock vehicles • "Find my car" via map or flashing headlights • Extend rental agreements • Access rental agreement details & vehicle insurance cards • Locate parking & gas stations 	<ul style="list-style-type: none"> • Find branch locations • Make reservations • Access special offers • "Find my car" via GPS • Roadside assistance • Parking reservations & payment through SpotHero partnership 	<ul style="list-style-type: none"> • Display toll payments • Extend rental agreements • Touch/facial ID authentication • See reservation details & add to calendars • Directions to branches from airports
What's next?	"Continued focus on enhancing our customers' experience."	Overhauling app & website to make reservations faster & more intuitive.	Adjust eligibility for Emerald Checkout & enable those outside the U.S. & Canada also to update preferences.

Business Travel News (USPS 0728-870, ISSN 8750-3670) August 13, 2018 Issue 841 Vol. 35, No. 12. Business Travel News is published monthly except semi-monthly in March, April, May, June, September and October by Northstar Travel Media, LLC, 100 Lighting Way, Secaucus, NJ 07094 (201) 902-2000, and is distributed free of charge to qualified corporate travel buyers and travel agents specializing in business travel in the United States and Canada. The cost of a print subscription to non-qualified subscribers is \$129 in the U.S.; \$142 in Canada and Mexico; and \$210 in other foreign locations; the cost of a digital edition subscription is \$65; payable in advance in U.S. dollars. Registered for GST as Northstar Travel Media USA GST No. 264513185. Canadian GST #123397457. Periodicals postage paid at Newark, NJ, and additional mailing offices. Business Travel News is a trademark owned exclusively by Northstar Travel Media. Copyright © 2018 by Northstar Travel Media, LLC. Reproduction of this magazine, in whole or in part, is prohibited unless authorized by the publisher. Editorial and advertising offices: 100 Lighting Way, Secaucus, NJ 07094. For all circulation inquiries, including new subscriptions, renewals, cancellations, changes of address and problems with missed deliveries, contact customer service by mail at Business Travel News, P.O. Box 47655, Plymouth, MN 55447; by phone at (800) 869-6882; fax at (866) 658-6156; e-mail at btn@kmpsgroup.com; or www.businesstravelnews.com/subscribe. POSTMASTER: Send change of address to Business Travel News, P.O. Box 47655, Plymouth, MN 55447. Printed in the USA. 

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