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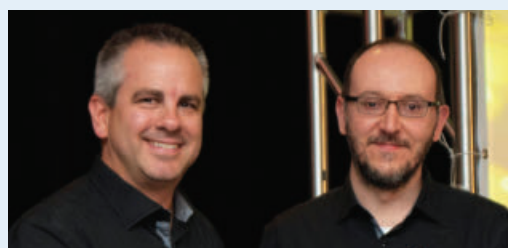
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BTN

BUSINESS TRAVEL NEWS



Troovo's Kurt Knackstedt & Tarik Sedlarevic



Serko's Tony D'Astolfo

BTN'S 2018 INNOVATOR OF THE YEAR

A company that aims to make virtual cards feasible for the corporate travel mainstream was crowned the Innovator of the Year by judges at the BTN Group's 2018 Innovate conference. A technology that enables open booking while capturing expenses and an airfare tracking and reshopping tool took home judges' honorable mentions while a New Distribution Capability-friendly booking tool was the People's Choice among conference attendees.

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TOP STORY

HOW CORPORATE TRAVEL BUYERS RATE U.S. AIRLINES

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



BTN'S 2018 AIRLINE SURVEY

Competitors Narrow the Gap on Delta

Delta has claimed its eighth consecutive victory in BTN's annual airline survey of corporate travel buyers. All three of Delta's biggest competitors improved on their 2017 scores in each category, but Delta maintained a healthy lead. United overtook American for second place, though both carriers earned their highest scores since their respective mergers earlier this decade. Southwest remained in fourth but had the most improved score. New products for the corporate markets, expanded communication with corporate customers, bigger investments in sales forces and more seamless connections to global partners are among the reasons sales leaders gave for improved scores.

FULL STORY ON PAGE 8

First GDS Processes NDC Transaction

BY JAY BOEHMER

In October, A U.K.-based travel management company transacted a flight booking on Travelport's Smartpoint point-of-sale system in accordance with the International Air Transport Association's New Distribution Capability standard. Travelport claimed to be the first major global distribution system to do so. The TMC, Meon Valley Travel, already was a Travelport NDC test partner when the GDS operator achieved NDC Level 3 accreditation last year, said Meon Valley corporate director Colin Boddy. Meon Valley completed the NDC-piped booking for "a short-haul low-cost flight from London to Milan issued by a major European carrier."

Neither Travelport nor Meon Valley would disclose the carrier. Alitalia, British Airways and EasyJet each offer nonstop flights on the route. BA has the most evolved NDC strategy among them and has introduced short-haul

additional price point fares, available only through direct or NDC channels. BA did not reply to comment. The London-Milan booking was live but in a test environment, said Boddy. As such, it did not involve a customer itinerary. "We tested various different scenarios—some using credit cards, some BSP. It's working well," he said. Airline NDC content via Smartpoint is not fully activated at Meon Valley, he added, and the agency continues to test.

Boddy described the Smartpoint NDC interface as a graphical user interface "that sits on top of the screen and alerts you to the fact that there could be NDC content. Then you click on it and it brings it through." Travelport envisions bringing NDC content in line with other content sources in the Smartpoint system. Boddy said the

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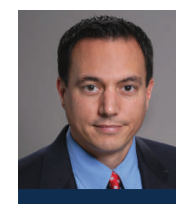
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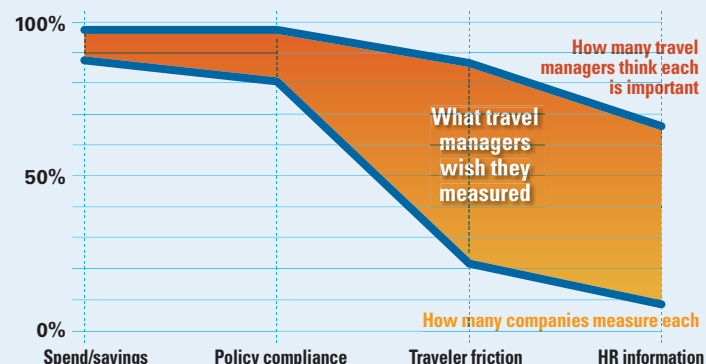


Certify CEO Bob Neveu on how adding an on-line booking tool helps the expense management company compete

"Bringing [T&E] together under a single system ... helps us be more aggressive in selling integrated solutions because once we're working with a company, we can ask them, 'What else can we do to help?'"

5 | Data Hub

The Travel Management Metrics You're Missing Out On





Business is about staying one step ahead
of the competition.

We're here to get you there.



Delta's Bastian Talks Air France Labor Dispute, Asia Strategy & Free Wi-Fi

BY MICHAEL B. BAKER

Delta CEO Ed Bastian is optimistic that ally Air France will overcome its ongoing labor issues, and the carrier is ready to play its role in that recovery. At the BTN Group's The Beat Live conference last month, Bastian said he's confident new Air France-KLM CEO Benjamin Smith will "figure this out." Smith joined the carrier from Air Canada, and Bastian said he was involved in hiring Smith. Several days of strikes and canceled service this year amid failed contract negotiations delivered a large financial hit to Air France, which also resulted in the departure of former CEO Jean-Marc Janaillac.

Part of the problem was that Air France has launched side projects that "are pulling away from the core mission of Air France," Bastian said, including new subsidiaries like Millennial-focused Joon. "We have to develop a vision for that company the employees are going to be excited about," Bastian said. "They have to pull it all in and make the main thing the main thing, which is the Air France brand."

Bastian said Delta would help improve operations at Paris Charles de Gaulle Airport and is ironing out "technology seams" between the two

companies. They're joint business partners, and Delta owns a 10 percent stake in Air France-KLM. "We've decided for us, we can't effect change on behalf of your customers if you're sitting solely in a commercial relationship," Bastian said. "You have to have a seat inside the board to make the change happen and hold them accountable."

On Oct. 19, Air France agreed with ground staff and cabin crew unions on a retroactive 2 percent pay increase for this year and another 2 percent increase on Jan. 1. The carrier still has to reach an agreement with Air France's pilot union, however.

ASIA GROWTH

Bastian said Korean Air has been a "fabulous partner" in their recent joint venture, particularly with the new terminal at Korea's Incheon International Airport that exclusively serves Korean Air and its partners. As such, Delta continues to shift its Asia traffic away from Japan and toward Seoul.

At the time of its merger with Northwest, about 90 percent of Delta's Asia traffic went through Tokyo. That is down to about a third,

and it "probably will be at zero at some point," Bastian said. Operations at Tokyo's Narita International Airport are "not sustainable," given that the international terminal at the closer-in Haneda Airport is opening in the last decade and that Delta lacks a partner in Japan; both United and American have Japan partners, he said. The partnership with Korean Air has connected Delta to 80 destinations in Asia, including about 30 in China, while Narita connected Delta to only a handful of destinations, Bastian said.

RETURN TO INDIA

Delta will announce details of its revived service to Mumbai in the coming months, including whether service will fly from New York or Atlanta. Delta had pulled service from India about a decade ago because the service was not economically viable, but Bastian said the carrier's budding partnership with Jet Airways and recent agreements between the U.S. and each Qatar and the United Arab Emirates have changed that landscape. Even so, it's not entirely a financial decision, he said. "It's based on a larger strategy. You can't say, 'No one better connects to the world,' when you don't fly to one of the most populous nations in the world."

FREE WI-FI?

Bastian made headlines recently with comments that Delta eventually would offer free Wi-Fi, though he has been making that pledge for some time now. That is still a few years off, as Delta is still exploring and refining its options. "We've first got to figure out how to do it, and then we are going to do it," Bastian said. "The first thing we need to do is make sure the technology works and once we get past that point, then make it free." ■

Meetings & Events Forecast

BY DAWIT HABTEMARIAM

Meeting planners are optimistic, according to American Express Meetings & Events' 2019 Global Meetings & Events Forecast, based on a survey in July and August of over 700 meetings and events professionals in 33 countries who answered questions about conditions in their own countries.

North America

Planners in North America predict the number of meetings and the number of attendees will increase across all meeting types in 2019 and that most meetings will last longer. Planners expect the estimated cost per attendee, excluding air costs, to be between \$1,200 and \$1,700.

The biggest meetings cost driver will be a 2.4 percent increase in the average daily rate for hotel rooms. U.S. planners expect room rates to rise 2.68 percent, while planners in Canada expect them to rise 1.25 percent. To deal with these costs, planners are considering reducing room nights to stay on budget, but this will be a challenge given the forecasted rise in attendees and meeting length. Planners also said the reduction or elimination of commissions by key hoteliers pressures their budgets.

In the U.S., planners expect a 0.91 percent increase in meetings spend, in line with the forecasted 0.8 percent increase in cost per attendee for North America. Planners in Canada expect their meetings spend to rise but not as much as the increase in cost per attendee and overall activity.

Europe

Internal team meetings and training meetings will remain the most prevalent types in Europe. The meeting type for which the number of meetings will rise most is customer advisory board meetings. Product launches also will rise.

Across Europe, attendance will rise particularly for incentives travel and advisory boards. Exceptions are Denmark and Sweden, where incentive travel will not grow, and France, where neither will grow. Meeting planners in Germany, Poland and Switzerland forecast an increase in attendance for most meeting types.

Planners in Europe predict the cost per attendee to range from \$1,000 to \$1,590; the cost will remain flat for internal meetings and increase by between 0.5 percent and 1.02 percent for all other meeting types. The report forecasts costs to outpace meetings budgets in Europe. Planners expect ADR to rise 1.6 percent and eat up considerable portions of their budgets. In addition, the commission cuts and the ever-increasing focus on delivering exceptional attendee experiences will dent planning budgets.

Asia/Pacific

Planners in Asia/Pacific expect growth across several meeting categories. Incentives travel and special events, driven by increased activity in China and Hong Kong, will see the most growth. Regionally, attendance is expected to grow slightly across all meeting types except internal meetings and training. Planners forecast that less meeting space will be available and that group hotels rates will rise. In addition, planners expect meetings spend to increase by 0.86 percent, led by 4.3 percent growth across China and Hong Kong. Australia spend will dip 0.3 percent, and Japan meetings spend will decrease 0.7 percent. ■

Certify's Transformation Since Its Big Capital Infusion Last Summer

When Certify announced the opening of its London office recently, CEO Bob Neveu characterized the move as an “escalation and an evolution,” a way to enhance its existing business serving U.K.-based companies while also providing a springboard to launch future expansion in the region. The same description aptly could be applied to Certify’s growth since securing a \$125 million majority-stake investment from K1 Investment Management in June 2017. That deal merged three other expense management providers under the Certify brand. Armed with that financing, the company wasted little time building out offerings and enhancing its footprint. In September 2017, Certify acquired NuTravel’s corporate online booking tool and has integrated it into the Certify expense management platform. The company also since has nabbed expense providers Abacus and Spain-based Captio, inked a global payments deal with Western Union and expanded its physical presence to the U.K. with the London office. Neveu spoke with BTN payment and expense editor Adam Perrotta.

CERTIFY HAS MADE A LOT OF ACQUISITIONS AND SERVICE EXPANSIONS LATELY. HOW DO THOSE MOVES FIT INTO AN OVERARCHING GROWTH STRATEGY?

We have a very intentional plan for organic growth via product enhancement and inorganic growth via acquisitions. Last year’s investment from K1 was a big pivot in our direction. Prior to that, we’d had a couple rounds of investment but we didn’t have the capability to do major acquisitions because we didn’t have the capital or the organizational capacity. For our first nine years [after launching in 2008], we were growing via adding functions and features, which was viable but slower. Now, we have the capital to make acquisitions and the management team to integrate a new platform post-closing. And you need that because it’s much larger than just buying up a competitor. You have to be able to put it all together.

SPEAKING OF INTEGRATION, YOU ADDED NUTRAVEL’S BOOKING TOOL TO CERTIFY’S PLATFORM, MAKING YOU ONE OF THE FEW PROVIDERS TO OFFER BOTH BOOKING AND EXPENSE. HOW DOES OFFERING BOTH HELP YOU COMPETE?

It’s a big piece for us. Concur has been the leader in that space, and for a long time, they were the only provider that had travel and expense under one roof. Now, the online booking tool gives us the ability to compete with them because the benefits of having both travel and expense together are many. If you have a separate system for each, you have two different contracts, implementations, data feeds. And users have two different login processes. Bringing those two things together under a single system



Certify’s Bob Neveu talks:

- Certify’s transformative period
- Offering both booking & expense
- Certify’s global T&E goal

and a single contract allows a client to have a more streamlined system. And it helps us be more aggressive in selling integrated solutions because once we’re working with a company, we can ask them, “What else can we do to help?” Everybody understands the bundle concept, and it’s really a natural fit between booking and expense.

ANOTHER MAJOR THEME HAS BEEN EXPANSION IN EUROPE, WITH THE CAPTIO ACQUISITION, THE WESTERN UNION DEAL AND NOW THE LONDON OFFICE. WHAT MAKES EUROPE AN ATTRACTIVE MARKET?

There’s so much green field for expansion there. In the U.S., among companies with less than 1,000 employees, around 51 percent use Excel or some other legacy system to do expense reports. In Europe and the U.K., that figure is around 70 percent, so it’s an even bigger opportunity. Now, some percentage of small companies will never adopt an electronic system, but you have to assume that in a more paperless world, more and more will embrace the technology. The other piece of it is: We’ve always had a global product, but we had some limitations on service. For instance, we didn’t have global payments; we only had domestic [Automated Clearing House]. So the partnership with Western Union allows us to pay in multiple countries and currencies. And with the new London office, we’re making an investment to put people on the ground because many companies do feel more comfortable working with a vendor with a local presence and the ability to work with them at their preferred hours.

ON THE TOPIC OF TECHNOLOGY, AN INTRIGUING TOPIC IS AUTOMATION OF EXPENSES. THERE’S DEBATE BETWEEN THE CONVENIENCE OF AUTOMATING APPROVALS AND THE CONTROL OF A MORE HANDS-ON APPROACH. WHAT ARE YOUR THOUGHTS?

There will be a blend of both approaches. There are systems now where you can approve and pay automatically based on certain rules, but we find a lot of companies, especially small companies, don’t want to do that. But for larger companies, there can be value in efficiency [from automation]. For instance, if you have 100 expense reports, there may be 30 that need to be reviewed more closely based on certain criteria like who the user is if that person has had reporting issues in the past. So if the system flags those automatically and enables you to only have to review those 30 instead of all 100, that makes the process more efficient but still leaves a manager in control. That’s the solution that will win in the market.

CERTIFY’S RECENT SPENDSMART REPORT FOUND THAT UBER WAS THE MOST FREQUENTLY EXPENSED BRAND IN THE THIRD QUARTER, AND LYFT WAS AMONG THE TOP 10. HOW HAVE YOU TAILORED YOUR OFFERINGS TO ACCOUNT FOR THE GROWTH OF THOSE SERVICES?

The biggest part for the user is receipt integration. You’re going to use their app to hail a ride but ultimately, you’ve got to get the receipt into the expense system, so we’ve created ways to efficiently capture receipts into Certify. And on the flip side, we can aggregate that user data for travel managers so they can understand the utilization rates and satisfaction levels of those providers. ■

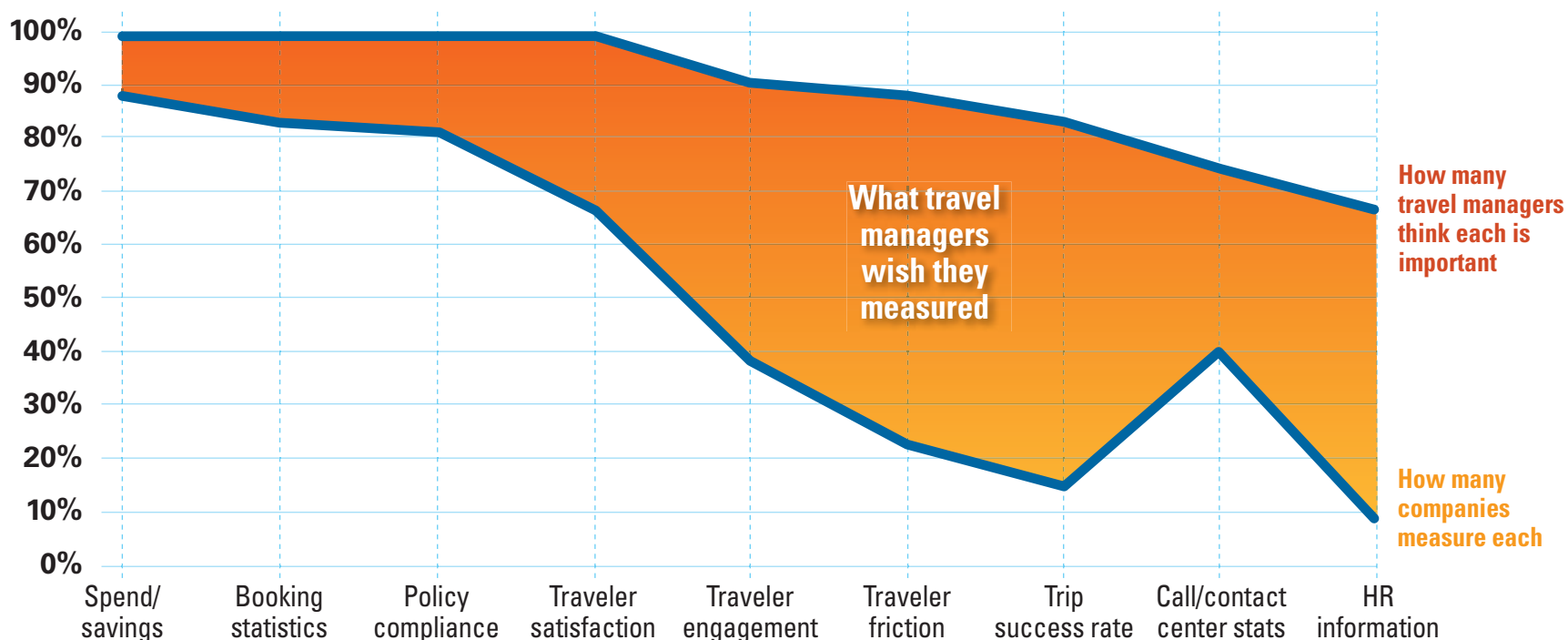
The Travel Management Metrics You're Missing Out On

Companies may not be using the right criteria to evaluate the success of their travel programs, warn the Association of Corporate Travel Executives and BCD Travel, which surveyed more than 300 travel managers around the globe. They found some stark disconnects between the factors travel managers said were important to assess and those their companies are actually measuring. Here's what ACTE and BCD found.

TRAVEL PROGRAM METRICS CONSIDERED

- Spend/savings:** Average rate/fare changes, cost avoidance, contract commitments
- Booking statistics:** Advance booking, online adoption, hotel attachment, defects
- Policy compliance:** Unmanaged spend, booking/payment methods, leakage
- Traveler satisfaction:** Net promoter score, surveys, service issues
- Traveler engagement:** Method/frequency of interactions with TMC or travel department
- Traveler friction:** Wellness, health/safety, willingness to travel
- Trip success rate:** Value/ROI, productivity
- Call/contact center stats:** Average speed of answer, average handling time
- HR information:** Recruitment, retention, attrition

THE METRICS COMPANIES OVERLOOK



MOST COMMON DATA SOURCES TO EVALUATE TRAVEL PROGRAMS

	Travel Managers
Travel management companies/agencies	94%
Suppliers	81%
Internal expense reporting	71%
Corporate card data	67%
Traveler surveys	61%

WHY DON'T TRAVEL PROGRAMS MEASURE THESE?

Many companies rely too heavily on third-party sources rather than on qualitative feedback from travelers themselves. Directly engaging travelers to measure satisfaction is an effective—and often overlooked—method of evaluating the success of a corporate travel program. But the engagement should occur in real time and happen through travelers' preferred channels. Both requirements are fulfilled particularly well by leveraging mobile communication, noted Miriam Moscovici, senior director of research and corporate innovation for BCD Travel and the author of ACTE and BCD's study. "You don't want to wait until after a trip to ask travelers how they feel about it. The best time to gather that information is in the moment, and there's no better way to capture traveler experience and sentiment in real time than through mobile."

Most corporate travelers are well-versed in delivering feedback via mobile from their experiences as consumers, so mobile communication with travelers increases response rates and reliability of feedback, she noted. Meanwhile, real-time mobile feedback also supplies travel managers with a steady stream of information that may be important and actionable in the short term. For example, one traveler experiencing a problem with a particular hotel could signal a larger issue with that property. Getting that feedback in real time enables travel managers to flag the issue and react accordingly to resolve the problem or rebook other travelers, Moscovici said.

American Airlines 



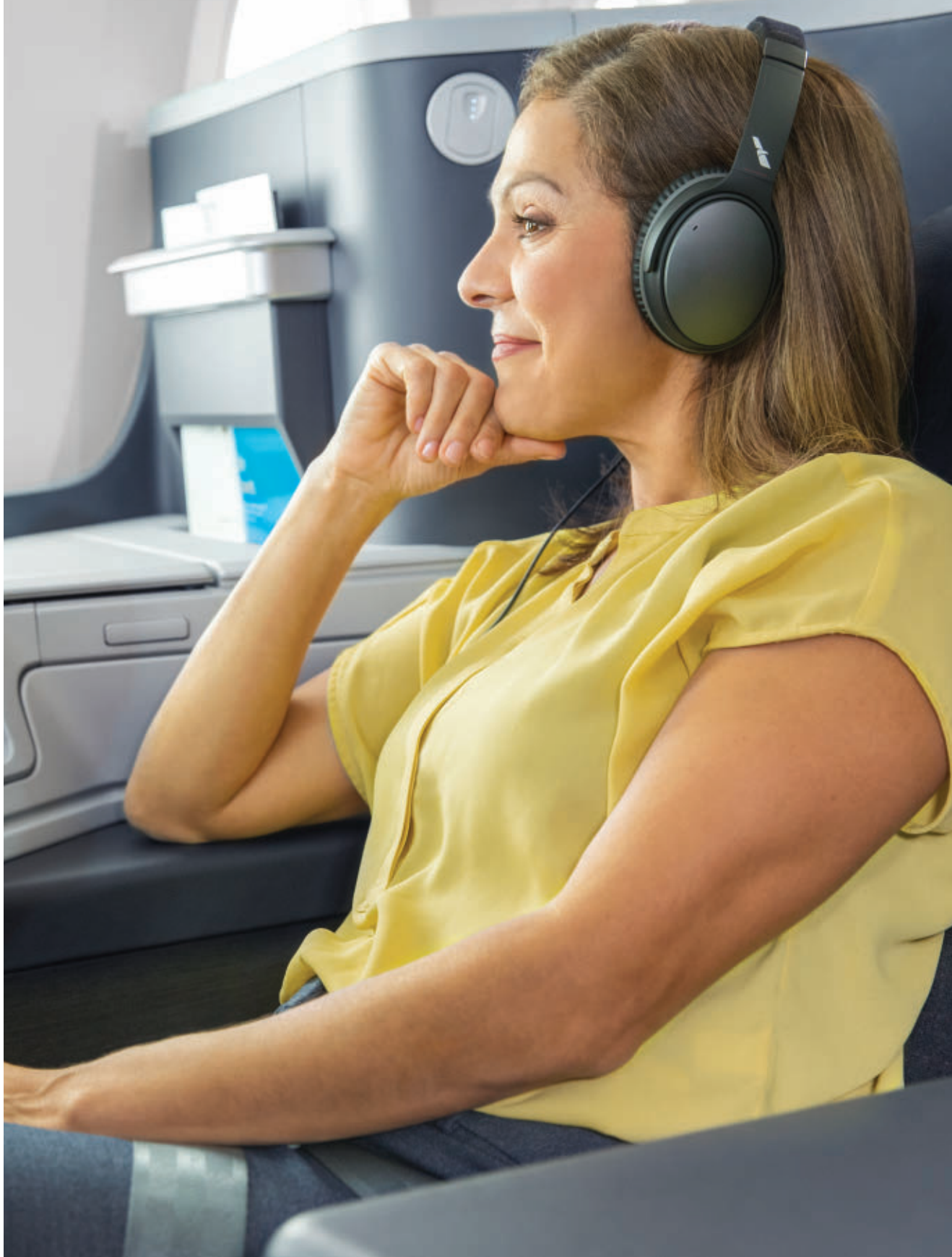
Nonstop flights from LAX to Buenos Aires.

Beginning December 19, Buenos Aires will be closer than ever with new nonstop flights from Los Angeles on the 787-9 Dreamliner, featuring Flagship® Business and Premium Economy.

Learn more at aa.com/morelatinamerica

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BUENOS AIRES



BTN'S 2018 AIRLINE SURVEY

Competitors Narrow the Gap on Delta

Delta has beaten its own record, winning BTN's Airline Survey for the eighth consecutive year. All its competitors, however, have upped their game. In BTN's 2018 Airline Survey, fielded among corporate travel managers and agents, Delta once again earned the highest score in every single category by a healthy margin. Meanwhile, United, American and Southwest each improved on their 2017 scores in every category. For United, that improvement was enough to overtake American for second place. It's the first time United has outscored American since 2015. The survey scores each airline in each category on a five-point scale, and United and American each broke the four-point barrier in a handful of categories, the first time either has done so in their post-merger states. Southwest remained in fourth place, but its total score improved more than any other carrier, up from 3.21 in 2017 to 3.46 this year.

Delta Aims to Globalize Success

Although it might be tempting to interpret this year's results as a crack in Delta's seemingly impenetrable armor, it's a crack one would need a magnifying glass to see. Delta's scores remained more or less the same as last year; generally, its scores in individual categories were within a few hundredths of what it scored in 2017, and its overall score was 4.39, one hundredth of a point down year over year. Still, the carrier still maintains a healthy premium over its competitors; the gap is wider than 0.6 points in all but three categories.

Eight isn't enough for Delta executives, of course, who still want to push its scores higher. "Our goal is to keep an open dialogue because it will always be a journey in how to add value," VP of sales operations and development Kristen Shovlin said. "Since the merger [with Northwest]—and the 10th anniversary just happened [in October]—we've put an emphasis on how we take our business and transform it back to a time when it was about relationships and partnerships."

Some travel buyers taking BTN's survey praised Delta for hosting events that enabled travel professionals

BY MICHAEL B. BAKER



to tour airports and fleets so they could better understand operations and the business. Others praised consistent and helpful communication from their sales reps. Communication with buyers was Delta's strongest individual score, as it was last year, and the airline also scored well for its account managers and sales reps. "Our rep with Delta is amazing," one buyer said. "He is always in touch, lets me know what is coming, helps whenever I need it and makes sure our travelers are happy and comfy and responsive at all times."

Resolving complaints was another high-scoring area for Delta and the one where its gap from competitors was the largest. "When and if an issue becomes a problem for one of our travelers, I do not need to get in panic mode," another buyer wrote. "Our Delta account manager and [the] Delta executive desk solves the issue, and if they can't, they provide an alternative solution."

Delta has been concentrating on spreading some of its best practices to its joint-venture partners, making it a more seamless experience for corporate travel buyers. Part of that has centered on the bigger picture—having Virgin Atlantic's fare structure line up better, for example, or making check-in and seat selection available across partner portals—but it also has involved some of the tools and services particular to the corporate space. This summer, for instance Delta and Air France-KLM aligned corporate travel benefits in their Corporate Priority Program, which gives corporate travelers across all the carriers access to better seats, priority boarding and priority for rebooking during irregular operations. It is globalizing its Delta Edge portal for travel professionals, as well. "It's been very clear the future is global, so we've decided a differentiator will be our relationship with our partners, making it more integrated than the rest of the industry," SVP of global sales Bob Somers said. "Our core strength is our domestic business, but our goal is for our global footprint to account for 50 percent of revenue coming from around the world." Right now, that revenue ratio is about 70 percent domestic and 30 percent international, Somers said.

As it aligns those products, Delta is clearing regulatory hurdles to bring its alliances with Virgin Atlantic and Air France-KLM into a single mega JV. It also kicked off its JV with Korean Air this year as it cleared the necessary regulatory hurdles and now is seeking approval for a JV with Canadian carrier WestJet.

Delta also continues to leverage its record of operational excellence. As of early November, the carrier has had 208 days with a 100 percent completion factor on its mainline flights, compared with 193 days at this point last year. Across the entire Delta brand, which also includes Delta Connection flights, Delta has had 118 days with 100 percent completion, compared with 64 at this point in 2017.

The carrier pioneered operational guarantee agreements with corporate customers a few years ago, in which it promised compensation should its operating statistics fall below both of its chief competitors. This year, it further refined its reporting metrics to show customers completion and on-time data based on their specific travel footprint, not just overall performance.

United Soars to Post-Merger High

This year, United earned its highest score in the BTN survey since its 2010 merger with Continental, as buyers praised the corporate travel-focused products the carrier has launched over the past few years. "[United] has really stepped up to the plate and offers a best-in-class program—finally!" one buyer remarked.

In particular, buyers complimented the Jetstream portal for corporate customers and travel management companies, released last year. One buyer noted that it has "given us more control over our services fund and United as a whole has done a tremendous job of streamlining or enabling self-service for

our TMC to take care of our travelers." Others praised the carrier's Corporate Preferred program, launched this summer, in which corporate travelers get priority consideration for upgrades and reaccommodation. One buyer called it "long overdue but the right step towards providing their valued corporate accounts with more priority, protection and amenities."

In addition, United launched a new corporate discount program, Propel, this summer for midsize travel programs. For those with at least \$250,000 in annual spend, it offers five tiers of discounts based on the program's market share. It also is including discounts on its JV partners—Air Canada, ANA and Lufthansa Group—for travel with a point of sale in the U.S. or Canada.

United SVP of worldwide sales Jake Cefolia, who has taken the mantle from longtime sales leader Dave Hilfman in advance of Hilfman's retirement at the end of the year, said the improvement in United's score indicates that "the investments we've made in servicing our customers as well as making sure we have a compelling value proposition to those customers ... is being recognized." The carrier intends to pick up the pace and is creating a "sales laboratory," a small selling team that will test out new products and services for customers and determine what should be scaled up from there, he

said. "The last few years, we've been launching one new product per year on average," Cefolia said. "Frankly, I think we could be launching three to five new products a year."

The meetings arena has been another focus for United. While flexibility in negotiating meeting pricing was United's lowest score, that's also one of the areas in which United improved the most, up to 3.52 compared with 3.16 last year.

Cefolia said his team has increased attendance at meetings-focused industry events and "has spent a lot more time working with the contracted corporate customers to better understand where opportunities reside and introduced more competitive pricing in markets on standard agreements."

United's highest score—and the highest individual category score for any airline on the survey besides Delta—was for its networks, part-

nerships and frequencies. The carrier has significantly bulked up its domestic network this year, adding about 40 domestic routes and several new international routes despite some grumblings from the profit-focused investment community. In addition, United has been working on tighter integration with its JV partners, Cefolia said. Besides including them in Propel, United has made boarding passes from partners available through its mobile app and this year is adding partners' flight statuses to its app, he said.

United's score in communications with buyers boasted the highest premium over American and Southwest. The carrier has created regional advisory boards on top of its larger corporate customer advisory board; it just conducted the first in California, and one is on the way in New York, Cefolia said. "We take pride that we have a team that is really out there, very visible with the customers and spends as much time listening as talking—and we have a lot of great stuff to talk about," Cefolia said.

American Hones Focus on Communication

Like United, American Airlines this year earned its highest post-merger scores, and the carrier has put a heavy focus on building up its sales team and improving communication with corporate customers, SVP of global sales and distribution Alison Taylor said.

Since 2017, American has added 136 sales associates and introduced a new training curriculum for its sales team, she said. In addition, it has launched a new newsletter for its corporate customers and has significantly increased the volume of communications to them; they are not getting just news about major events like hurricanes but "know about the great things



BTN'S 2018 AIRLINE SURVEY

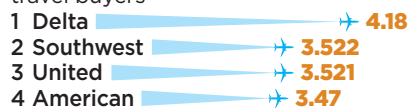
TRANSIENT PRICING

Customizing discounts & other negotiated prices



MEETINGS TRAVEL PRICING

Customizing discounts & other negotiated prices for preferred travel buyers



SERVICES & AMENITIES

Customizing traveler-focused offerings like soft-dollar benefits & VIP treatment in flight & at the airport



DISTRIBUTION CHANNELS

Providing comprehensive published & private content through preferred booking channels



COMPLAINT RESOLUTION

Responding quickly & effectively to buyers & travelers



COMMUNICATION WITH BUYERS

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



ACCOUNT MANAGERS & SALES REPS

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



CUSTOMER SERVICE FOR TRAVELERS

Timeliness, reliability, cleanliness, support & communication



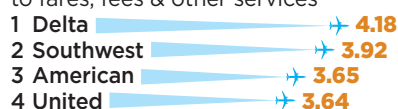
NETWORKS, PARTNERSHIPS & FREQUENCIES

Service to the destinations corporations need to reach



VALUE

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



we are doing on our journey to be the easiest company to do business with," Taylor said.

One buyer cheered the "constant contact" from the company's American Airlines representative. "She listens to our needs and acts on them and is very responsive to any issues," the buyer said. "We understand that while we are not American's biggest customer, we certainly are very important to them, and I credit that feeling to our rep."

Product has been another focus for American, Taylor said, including increasing Wi-Fi availability across its fleet and expanding availability of its Flagship Lounges, which offer high-end dining options. The next is scheduled to open in Dallas early next year. The carrier also is on track to become the first North American carrier to have a dedicated premium economy cabin across its widebody fleet by May 2019, Taylor said. "We haven't seen travelers buying down from business," American Airlines sales strategy manager Anthony Rader said. "We're seeing it as an upsell [from economy] to a great product and great meal services."

Distribution, one of the carrier's highest-scoring categories, has been front and center at American, as well, particularly as it has developed strategies around the International Air Transport Association's New Distribution Capability standard. As yet, the carrier is the only one in North America to offer incentives for segments booked on NDC connections, and there will be "NDC-powered content delivered to the corporate marketplace" starting next year, managing director of strategic account sales Hank Benedetti said.

In October, American went live on SAP Concur's TripLink, enabling corporate travel buyers to capture data booked directly on the airline's website. Taylor said "many great companies are lining up" for trials with the technology, including Google.

Like its competitors, American is solidifying its global JV strategy. It is "getting closer" to getting its necessary approvals for a JV with Latam and took a small stake in China Southern last year. This year, it also announced it would once again seek a joint business agreement with Qantas; the U.S. Department of Transportation rejected such an agreement in 2016.

Next year, American will launch a data portal called SalesLink Insights that will enable corporate travel buyers to monitor contract performance, spending—including on nonairfare items like checked bags and change fees, Benedetti said—and operational data. American is testing the portal with high-profile agencies and corporate customers, Taylor said. One buyer said that tool would be "valuable in program management."

Southwest Sees Fruit from Corporate Business Investment

Southwest has significantly built up its corporate sales efforts as its scores improved on BTN's survey. Meanwhile, many of its weakest scores this year are areas

already tapped for investment in the near future.

Over the past year and a half, Southwest has grown its corporate sales organization from about 25 to more than 80, including doubling the number of sales employees in the field and developing teams focusing on specific segments, such as government travel. The carrier is on track to quadruple the number of new contracts from 2017 to 2018. "[Southwest seems] to be focusing on the corporate market more than I have seen before, so I look forward to that positive change," one travel buyer said.

Southwest VP of corporate sales Dave Harvey said the airline is "starting to see the fruit" of its investment into the corporate market, noting one of the strongest gains on BTN's survey was for account managers and sales reps, up from 2.96 last year to 3.25 this year. "We'd heard a lot in 2017 [from customers] that they were not seeing enough of us," he said. "We've now been getting more active in building those relationships."

The carrier is making "major investments" in its Swabiz business platform, Harvey said, which should improve scores around distribution channels, traditionally one of Southwest's weaker areas in the survey. For example, travelers cannot book international travel through Swabiz, and its reporting needs improvement. Harvey said reporting will be addressed in "major announcements" around the end of the year. "We were the first to market with that direct booking tool in the space 15 years ago, but we hadn't put the investment in it," Harvey said. "Now, we're not only playing catch-up, but we're going to move ahead of the competition."

While negotiating services and amenities pulled in Southwest's lowest score this year, it also was among the biggest gainers, up from 2.68 last year to 3 this year. The carrier has worked to be more flexible with its contracts, such as enabling travelers to get higher loyalty tier benefits from the beginning and status matching, Harvey said. It is exploring personalization strategies, as well. For example, Southwest is looking at how it can use data for "surprise and delight techniques," like a traveler who had a bad experience on a previous trip receiving a drink coupon on the next trip, he said.

Networks, partnerships and frequencies is another area where Southwest could make gains. It has built up its network, particularly out of Cincinnati and for intra-California travel, Harvey said. Additionally, it is getting close to launching its service to Hawaii—not a major business destination but a big one for meetings and incentives—and Southwest will be the sole carrier to take on Hawaiian Airlines on routes between the Hawaiian islands. Southwest's recent switch to a new reservations system has enabled codesharing, which the carrier has indicated will be a future strategy, as well.

As it did last year, Southwest outscored both United and American for each its customer service and its overall value. The carrier has stood firm in not charging change fees or fees for checked baggage, and it is exploring ways to add more value. Late last year, for example, it added a same-day standby benefit for A-List and A-List Preferred travelers. ■

METHODOLOGY From September to October, BTN collected 527 responses from travel manager and buyer members of the BTN Research Council and subscribers of BTN and Travel Procurement and 74 responses from travel agents. Seventeen percent of the travel buyers spent less than \$500,000 on U.S.-booked air volume in 2017, 13 percent spent \$500,000 to \$1.9 million, 35 percent spent \$2 million to \$12 million, and 35 percent spent more. BTN developed the categories with travel buyers, corporate travel agency managers and airline sales executives. It averaged scores in each category to create an overall score for each carrier, weighing each category equally. Respondents graded only those airlines with which they negotiated a contract or booked a meaningful amount of business in the past year. Participants who offered no response for a particular category or airline were not included in that category or airline's average rating. The survey listed the largest domestic airlines as identified by the U.S. Department of Transportation, excluding regional affiliates of major carriers. Alaska Airlines, Frontier Airlines, JetBlue and Virgin America elicited responses from less than 25 percent of the final survey sample and therefore were excluded from this report. Equation Research hosted the survey and tabulated the results.

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Troovo CEO Kurt Knackstedt (left) & chief solutions officer Tarik Sedlarevic

Troovo Takes Home 2018 Innovator of the Year Award

BTN's 2018 Innovator of the Year just may be the company that finally brings virtual payments into the mainstream for corporate travel. Judges at the BTN Group's recent Innovate conference awarded the prized title to robotic process automation, or RPA, provider Troovo. The company aims to take the pain—and the high price—out of generating and using virtual cards. "Virtual cards remain very clunky to use and are driven by people-powered processes, which makes them very expensive," said Troovo CEO Kurt Knackstedt. "We believe this is the reason virtual cards are still the exception in our industry and not the norm."

Troovo's solution makes virtual payments "virtually free," Knackstedt said. The RPA platform can integrate with any travel booking platform or enterprise procurement system, connects to all major credit card issuers and can process payment for travel bookings from any source, including travel management companies, online booking tools and chatbots. Once a booking request has been made, Troovo's automated system contacts the card issuer to request a virtual card number, provides the merchant with that payment information and sends detailed payment info to the travel supplier and traveler.

There is no interface for travel agents or back-office teams, so there are no training requirements and human error is removed from the equation. The platform is available in all major markets and can be branded by corporate clients or TMCs. The robotics efficiency enables Troovo to offer its services at a low cost. The system is priced at 25 cents per travel booking/passenger name record, including changes or edits. At that price, virtual cards are viable for transactions beyond their most-common current use case of hotel booking. "We believe virtual cards should be used across air, ground, and whatever else a company decides it wants to centrally bill," Knackstedt said. "We give you that opportunity because at that type of cost" and with the ability to generate multiple cards per booking, "you get more scale out of using virtual cards."

That vision resonated with Innovate's judges. "The industry has been struggling with virtual payments for a long time now, and [Troovo's] use of robotics seems to be way more advanced than other companies within this space," said Norm Rose, Travel Tech Consulting president & Phocuswright senior tech analyst. The judges also praised the company's low cost and microservice approach.

THE COMPETITION

AMTRAV



One way travel management companies can fight back against the prospect of becoming commodified: offering an end-to-end service that handles trip management from search and booking all the way through to expense reporting. Chicago-based TMC

AmTrav embodies this holistic approach with its a2b platform, which features expanded content aggregation and a new expense reporting tool. For off-channel bookings, travelers can forward their confirmation emails to AmTrav, where email-parsing technology from Traxo automatically relays information to the corporate travel manager. Putting it all together under one roof was no easy task, noted AmTrav president and co-founder Craig Fichtelberg. "We built this from the ground up, and we understand the expectations of corporate customers, so we made it very versatile."

The judges were impressed by the ambition of a2b's single-umbrella design, which they noted would offer simplicity for travel managers. However, they wondered whether the all-in-one approach would constrain clients who want to break out certain services to microservice providers or other TMCs.

FLIGHTGLOBAL



Flight disruptions are among the most frequently cited reasons for unsuccessful business trips by corporate travelers. While flight disruptions can't be eliminated, FlightGlobal aims to make them less painful with its

Travel Waiver Services proactive flight waiver program.

The platform automates the typically manual process of issuing waivers for fees for qualifying rebookings. That reduces labor and mitigates the risk of human error during large-scale disruptions resulting from, for example, storms or labor strikes, said traveler services VP Robyn Grassanovits.

The application programming interface-based system aggregates, consolidates and standardizes waivers for different airlines and matches each waiver with a qualifying passenger name record and trip for FlightGlobal's client corporations and travel management companies. The waivers push to travelers directly, reducing the need for TMCs to provide phone support to travelers and to contact airlines to obtain waivers.

The judges commended FlightGlobal's approach to a significant problem and said it is a "great first step," though they look forward to the platform evolving to be more proactive.

HRS



Hotel solutions provider HRS presented its new rate-filtering service, an add-on to its Rate Protector suite, to ensure hotel rates and amenities displayed to travelers and agents adhere to negotiated terms. The artificial intelligence and digital

automation tool identifies incorrect rates and prevents them from hitting online booking tools and agent desktops. That avoids rebookings after the fact. "We can now automatically and in real time identify if there is a deviation from the contracted rate," said HRS chief product officer Martin Biermann.

Ensuring that incorrect rates are filtered out at the front end can help corporate clients save an average of 2.8 percent of the savings they negotiated with hotel properties, he said, a significant amount for large corporations. Rate filtering is available at no cost to HRS clients that use its hotel booking solutions.

The judges applauded the proactive approach to ensuring correct rates on the front end of the booking process. However, they characterized the filter as more of an extension of the existing Rate Protector service rather than a standalone innovation.



Serko North America SVP
Tony D'Astolfo

People's Choice: Serko

The International Air Transport Association's New Distribution Capability promises to put ancillary airline products and customization into play for managed travel. There's just one problem: Corporate booking tools can't accommodate the content. Enter Serko. The New Zealand-based provider has developed the first NDC-enabled corporate booking chatbot, dubbed Zeno. The company's Level 3 NDC certification means it can display, price and book ancillary content like seat upgrades, bag fees and meals in real time through an interactive chatbot. The engine pulls content from multiple sources, including all major global distribution systems, as well as NDC exchanges, aggregators and a direct connection with Australian carrier Qantas.

While the Zeno interface is straightforward, the behind-the-scenes work is complex, noted Serko SVP Tony D'Astolfo. Among those tasks are normalizing data and terminology for content across airlines, fitting NDC content into the booking workflow and applying corporate policies. The result is a seamless process that enables the user to shop for different services easily. Routehappy integration provides photo and video descriptions. Zeno also can use loyalty accounts, now live with Qantas, to customize options.

"This is what the airlines want. They want to be able to retail their product right at the point of purchase," said D'Astolfo. "When you have a multisource engine, you can take content from different sources and make it seamless for the end user." Meanwhile, travel managers enjoy visibility into the true cost of a trip during the booking process, ensuring that booked costs adhere to policy.

Zeno has drawn interest in North America this year. Serko has signed reselling deals with Canadian travel management companies Voyages Encore Travel and Custom Travel Solutions.

The judges praised Zeno's pricing transparency and its integration with loyalty programs, though they suggested more targeted offerings to reduce the number of clicks in the booking process. Zeno's focus on NDC definitely swayed Innovate attendees, who voted to award it People's Choice. "This is where the spend is going and where airlines are moving," D'Astolfo said, "so we're going to jump right in."

OBEX SOLUTIONS



Obex Solutions offers a mobile corporate travel platform that plays well with others. Designed to incorporate tools and aggregate data from multiple service providers into one cohesive experience for the user, Obex enables users to book and manage travel via a variety of channels while connecting that information to the travel manager on the back end. Incubated by travel management company Frosch Travel, the platform can integrate with major T&E services, including Concur and Chrome River, along with communication channels like Slack and Skype for Business. A WhatsApp integration is also in the works, said chief technology officer and co-founder Sridhar Balaji. On the booking side, Obex offers content from global distribution system and non-GDS sources and can access New Distribution Capability content. A real-time chat function assists travelers during the entire travel process, from booking through expense reporting.

The judges praised Obex's mobile-first strategy but said corporate buy-in on an app-based product could be tough due to perceived security risks. Judges also liked Obex's openness to third parties but would like to see Obex be able to provide services to other TMCs rather than aiming to replace companies' existing TMC relationships.

ROOMIT BY CWT



Travelers often book directly with hotels to get more loyalty points, and a recent study commissioned by Carlson Wagonlit Travel showed that three of 10 travelers prioritize receiving points even over staying in safer hotels. Thus CWT has turned that premium on points around to incentivize travelers to make channel-compliant bookings through its RoomIt hotel distribution channel.

RoomIt's Loyalty Booster function offers travelers extra loyalty points for booking through RoomIt and displays those point offers while users shop for rooms. Messaging through corporate clients promotes Loyalty Booster bonuses that drive travelers to companies' preferred booking channels.

The results of using points as a carrot have been encouraging since Loyalty Booster launched earlier this year, noted RoomIt by CWT chief growth officer and founder Scott Brennan. Early data showed that the program drove as much as a 12 percent increase in hotel attachment rates for clients and an 11 percent increase in preferred supplier spend.

The judges called Loyalty Booster "the right offering for the right audience" but encouraged more transparency in the business model around how points are applied and how hotels are selected for inclusion in the program.

THE JUDGES



NORM ROSE
Travel Tech Consulting
president & Phocuswright
senior tech analyst



STEVE CLAGG
Microsoft travel
technology manager



BECCA RABINOWITZ
SpotHero for
Business head



CATHY SHARPE
ITW director of global
T&E management

CONTINUED ON PAGE 14



Judges' Honorable Mentions

SHEP



Shep
co-founder
& CEO
Daniel Senyard

Shep's open booking policy and expense-capture tool was "one of the more forward-thinking business solutions" presented during the Innovate competition, according to Becca Rabinowitz, a judge for the 2018 competition and head of SpotHero for Business, BTN's 2017 Innovator of the Year. Given the proliferation of unmanaged travel, Shep's strategy of installing a layer of management on top of off-channel bookings will become increasingly important as the travel booking ecosystem evolves, noted Rabinowitz.

Shep helps travel management companies and travel managers combat leakage by offering users the same booking experience they've grown accustomed to with consumer booking channels. As a browser extension, it kicks in when consumers use such sites to book flights or hotels, guiding the booking via pop-ups to encourage compliance with corporate travel policy. At the end of the booking, Shep forwards the information to the corporate travel manager for reporting, duty of care, data capture and other uses.

Originally designed for use by small and midsize enterprises just beginning to require corporate travel tools, Shep's technology has attracted interest from larger companies. During the Innovate conference, it announced its first-ever TMC partnership, with Australia's Flight Centre Travel Group.

TRAPPIT



Trappit
U.S. general
manager & CEO
Angel Maroto

Madrid-based airfare tracking and reshopping tool Trappit gives corporate travel programs the ability to save on particular fares but also offers something that's arguably more powerful: information a corporation can use in negotiations with its airline partners to ensure they're getting the best rates.

Trappit uses an algorithm to monitor airline ticket costs every few seconds from the moment of original booking right up through the day of departure. If a lower fare for the same itinerary is found, the travel agency is notified and the booking is changed to the lower-priced ticket.

The solution works with all global distribution systems but also scours sources like airline websites and travel agencies. Cancellation and re-booking fees are taken into account when calculating whether a fare is lower than the original ticket price. There are no software or IT requirements, and reports are generated on savings.

The judges praised Trappit's ability to offer savings and valuable insight into content travel programs may not be capturing via their travel management companies. "As travel managers, we always have the challenge of someone getting a better rate outside of the program, and to be able to capture that info can have an impact from a sourcing perspective, as well as identifying where there might be gaps in content" from the TMC, said judge Cathy Sharpe, ITW director of global T&E management.

CONTINUED FROM PAGE 13: THE COMPETITION

TRAVELBANK



TravelBank bills itself as a "next-generation TMC," according to chief revenue officer Josh Abich. The booking and expense management app was built with design in mind, including a mobile-centric strategy and 24/7 customer support.

Hotel and air bookings are available now, with ground transportation and train bookings planned for the near future.

But what differentiates TravelBank is a rewards feature that incentivizes travelers, with rewards cards, to beat an artificial intelligence-generated budget prediction for a given trip. To help travelers save, the platform includes bookings with Airbnb, VRBO and HomeAway.

TravelBank's mobile-first model helps attract customers, and the judges noted the potential within TravelBank's integrated approach and rewards engine. But, as with any challenger to the travel management company model, the company faces a tall task in convincing corporations to switch from their existing providers.

TRIPSTREAK



TripStreak's TripScore technology offers travel management companies a way to harmonize the desires of business travelers and their corporations, said CEO Charles Ralston. It increases channel compliance on hotel, air and car rental bookings. Trip-

Streak's search engine prioritizes search results along not only preset preferences from travelers but also travel policy and preferences from their companies, resulting in a search process that's more efficient for both parties. TripStreak enables corporates to set different levels of priority around variables like cost and preferred suppliers to fine-tune the search results, and an algorithm-generated TripScore applies to each flight, hotel or car option so travelers can compare them easily. TMCs can integrate TripStreak via application programming interface or software license.

The judges were pleased with TripStreak's focus on personalization and the scoring model but were concerned with the time, up to five seconds, to generate scores within the search process and about the need for each traveler to enter their preferences as they're onboarded.

URBANDOOR



Despite the rising demand for corporate furnished/serviced apartments, a need remains for a simple way to search for them. Urbandoor aims to fill that gap with its digital marketplace, which connects travelers with apartment operators around the world.

Employees enjoy better living experiences in professionally operated apartments, there's one point of contact for duty of care and there's transparent reporting, said CEO Erik Eccles. Costs for apartments, meanwhile, average 40 percent less than hotel rates for a comparable time of stay, and the marketplace model brings in hundreds of apartments that otherwise wouldn't be visible to travelers.

Urbandoor works in over 1,300 global markets, and since its start in 2015 has signed up 125 corporate clients directly, along with seven travel management companies and a number of managed relocation firms, Eccles said.

The judges appreciated the savings, curation of content and high-quality user experience but encouraged a deeper integration into the corporate travel ecosystem, such as connecting with an expense tool.



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SAS Will Surcharge Corporate Payments

BY AMON COHEN

On Nov. 7, Scandinavian Airlines imposed a 1.96 percent surcharge in 15 European countries on bookings settled through corporate payment mechanisms like corporate or lodge cards. American Express, Diners Club, Mastercard, Visa and Universal Air Travel Plan corporate customers all will be affected.

“The rationale is that the majority of airlines are charging this fee, so we are following market practice,” a spokesperson said. When the European Union’s revised Payment Services Directive, or PSD2, banned surcharges on Visa and Mastercard consumer cards in January 2018, some carriers opted to introduce or retain surcharges on corporate payments. British Airways introduced a 1 percent surcharge, while Air France-KLM opted for 2 percent and Norwegian Air for 3 percent.

However, the picture is complicated by different interpretations of PSD2 in certain countries. Some countries ban surcharges on corporate as well as consumer cards. SAS will not, for example, introduce the corporate card surcharge in Sweden, one of its three home markets, or in France.

Following the introduction of the Interchange Fee Regulation in 2015, card companies in the EU can charge airlines and other merchants much higher fees for corporate payments than are allowed for consumer cards. “This is effectively an increase in the cost of buying an air ticket for business,” said Soeren Schoedt, managing director of Denmark-based travel buying consortium TravepoolEurope. “It ends up being treated on the ticket as tax, and you don’t get a discount in your corporate deals on taxes, which typically account for around one-third of the total ticket price.” ■

“The majority of airlines are charging this fee, so we are following market practice.”

—SCANDINAVIAN AIRLINES SPOKESPERSON

International SMEs Boost Amex GCS Billings

BY ADAM PERROTTA

Higher spending by corporate cardholders and strong billing growth among non-U.S. small businesses helped drive increased earnings for American Express Global Commercial Services during the third quarter.

Card-billed business for Amex GCS, the division that operates the company’s corporate card programs, was \$122 billion, up a strong 12 percent year over year, adjusted for foreign currency. GCS reported net income of \$606 million, up 20 percent from the \$505 million recorded a year ago, while cards in force for the division jumped 4 percent to 14.4 million, according to Amex. Average quarterly cardholder spend also increased 7 percent to \$8,469. Total GCS expenses were \$2.2 billion, up 10 percent year over year, an increase Amex attributed to rewards and other cardholder engagement costs.

GCS comprised 41 percent of Amex’s overall card billings during the quarter. Among GCS

Corporate card billings for American Express clients with less than \$300 million in annual revenue rose 23% YOY in Q3.

billings, the international small and midsize enterprise segment, defined as companies with less than \$300 million in annual revenue, was particularly robust. Billings for that segment rose 23 percent, adjusted for foreign currency. “International SME remains our highest-growth customer segment,” Amex CFO Jeff Campbell said. “Our growth in this segment has accelerated significantly in the last year, and we continue to believe that we have a long runway for growth, given the low penetration we see in the top countries that we offer international small business products.”

Companywide, American Express earned a third-quarter net income of \$1.7 billion, up 22 percent from \$1.4 billion a year ago. Worldwide airline-related spending across all product types was up 9 percent year over year during the third quarter, adjusted for foreign currency, while U.S. T&E-related billings increased 8 percent. Revenue net of interest expense reached a record \$10.1 billion—beating out last quarter’s then-record \$10 billion. ■

Uber Turns Key on Rydoo Integration

T&E platform Rydoo can automatically populate Uber for Business receipts into Rydoo’s expense app. Employees then can submit those expenses with a single click. In August, Uber for Business announced its intention to integrate with Rydoo, along with Expensya, Happay, Zeno by Serko and Zoho Expense. The ride-hailing giant previously integrated with Certify, Chrome River, Concur and Expensify. Rydoo was launched in June 2018

by Sodexo, which built the platform from the technology gained via Sodexo’s 2017 acquisitions of Belgian expense management company Xpenditure and business travel booking tool Maya. Sodexo combined the tools for the desktop version of its platform, but Rydoo Expense and Rydoo Travel are separate apps. However, the company does plan to merge them into a single app eventually.

—Adam Perrotta



Hilton Launches Hostel-Inspired Brand

Hilton has launched an urban microhotel brand called Motto by Hilton that borrows from the emerging lifestyle hostel trend in the lodging industry.

Motto by Hilton properties won't feature the shared guest rooms many associate with hostels, however. Hilton research found that many of the travelers who stay in hostels don't actually like staying with strangers and instead book hostels with friends and family.

"Following extensive market research that focused on consumers' needs and wants, we discovered the opportunity for a brand that offers travelers a trifecta of centrally located, reasonably priced and less traditional lodging that provide a one-of-a-kind experience," Hilton chief customer officer Jon Witter said in a media release. The company said room rates will vary by market but they will make Motto "a viable option for travelers who typically stay with friends or family or seek out temporary housing options when traveling to urban markets."

The Motto by Hilton guest room will have an average footprint of 163 square feet; for context, a U.S.-based Hampton Inn guest room is 333 square

Motto for Hilton rooms offer traditional beds, couches that fold out into beds or lofted beds.



feet on average and a Tru by Hilton guest room is 255 square feet on average. The microrooms will leverage space-saving furniture, including lofted beds, Murphy beds, segmented shower and toilet stalls and multifunctional furniture. All Motto by Hilton guest rooms also will feature Hilton's Connected Room technology, which enables guests to control things like temperature, lighting, TV and window coverings from their mobile devices using the Hilton Honors app.

Taking a nod from the group travel appeal of hostels, Motto by Hilton will allow for linking rooms; a group of guests can book multiple rooms adjacent to each other in advance. The brand also will enable split payments between multiple people at the time of booking. Motto by Hilton properties will feature a community hub for travelers and locals, plus a cafe and bar that transitions from day to night.

Hilton already has a development deal with Dominus Group to build a 100-bed Motto by Hilton in Marylebone, London, which is expected to open by 2020 as one of the brand's first properties. Hilton is looking to establish the global brand in markets across Europe, the Americas, the Middle East and the Asia/Pacific region. It is in various stages of development to bring Motto by Hilton to prime neighborhoods in Lima, Peru; Dublin, Ireland; Savannah, Ga.; San Diego; Boston; and Washington, D.C.

Hilton isn't the first major hotelier to look to the growing hostel segment. AccorHotels in September 2016 launched its own hostel-style brand, Jo&Joe, which features a community "open house" space, as well as a mix of private rooms and group rooms, in addition to shared rooms. Some other brands playing in this space include Marriott International's Moxy Hotels and Pod Hotels. Travel research firm Phocuswright, owned by BTN parent company Northstar Travel Group, last year pegged global hostel revenue at about \$5.5 billion and projected it would rise to \$6.4 billion by 2020. ■

Gant Travel Strikes Partnership Agreement with Airbnb for Work

Gant Travel has formed a partnership with Airbnb for Work to make Airbnb content available to all its Concur Travel customers.

Concur began integrating Airbnb for Work listings into its booking platform alongside traditional lodging options back in August. That integration still requires customers to opt in in order to access Airbnb for Work content.

Gant, though, is using an opt-out model in which all its customers will automatically have access to Airbnb for Work listings. Gant president Patrick Linnihan said going opt-out rather than opt-in as Gant has done with other technology integrations allows for "so much more speed and momentum."

Prior to forming the partnership, Gant

tested the waters with some of its trusted clients, and they "positively received it," Linnihan said. "We have a ton of experience in the small to medium-size business support, and Gant employees use Airbnb where appropriate," Linnihan said. "So we know that for the right situation, this is the most productive and cost-efficient way to travel." Private accommodations aren't going away, Linnihan added. "We thought it was just a matter of time until we saw other players become more deeply involved in this, and we want to lead and we wanted to master it first so we jumped in."

Airbnb has been making moves to grow in the corporate space in recent years and as such is finding a foothold with established

players. "TMCs, obviously, are important within the industry. They're important to our customers," said Airbnb for Work channel integrations lead Sonia Anderson. "We're looking at finding ways that we can better collaborate and work with them. This is one way, bringing them content using tools and processes that companies already use—making ourselves more a part of that ecosystem so we can better collaborate and work with them."

Gant Travel is an unsurprising first mover in this space. Though Airbnb struck deals with the three mega travel management companies back in 2015, Gant is the first TMC in the SAP Concur ecosystem to partner with Airbnb. The TMC is also a founding member of the Concur TMC Preferred Partner Program, and Linnihan has said the company's goal is to make itself the best TMC in the world for Concur.

Gant expects to have more than 1,500 customers' Concur Travel sites enabled with Airbnb content. Linnihan expects that through this partnership, Gant will be able to bring in TripLink Airbnb data and place it into itineraries and into its reporting tool, as the TMC does with other TripLink partners. ■



Airline Analyst Calls Agency Commission Growth 'Alarming'

United Airlines during its quarterly earnings call reported double-digit-percentage growth in corporate revenue on a year-over-year basis. With revenue, however, come selling and distribution costs, and Wolfe Research analyst Hunter Keay seized on one of them: the “alarming” growth in commissions airlines pay to travel management companies. The trend is not confined to United, either, he stated.

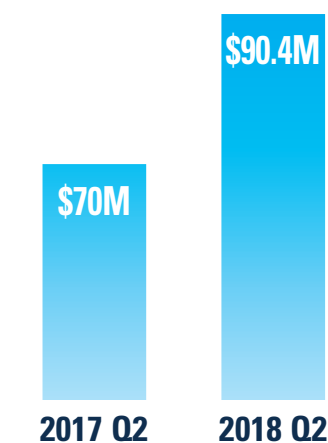
In a research note released after the earnings call, Keay wrote that United “cited strength in corporate travel trends due to smarter network decisions, which is surely a part of it, but paying travel management companies to steer corporate travel to the airline is happening by all three network airlines and it’s happening at alarming levels. No knock on UAL here—they’re doing what they need to do to be competitive—but this issue is one to watch as airlines work to drive out costs in 2019. It’s already impacting UAL around the margin, it seems.”

Keay pointed to U.S. Department of Transportation data that shows United’s agency commissions rose 29 percent year over year in the second quarter of this year, the latest data available. Based on those DOT figures, which cover commission expenses among U.S. carriers across geographic regions, United spent \$90.4 million on total agency commissions, up from \$70 million for the same period last year.

During the call, Keay asked United execs how much corporate share the carrier is “buying with these incentive fees” and expressed concern that agency commissions could “spiral out of control and we have some sort of cost arms race like we had in the ’90s on this.”

Back then, U.S. airlines offered travel agencies standard base commissions. Those have fallen to the wayside and, over the past two decades, commission levels paid by U.S. carriers have come down dramatically. More recently, they have regained some year-over-year growth. Beyond the base commissions of yore, negotiated agency incentives like front-end commission programs and back-end override deals remain.

United’s Q2 Commission Payouts to Travel Agencies



Source: U.S. Department of Transportation

According to Wolfe Research analyst Hunter Keay, “Paying travel management companies to steer corporate travel to the airline is happening by all three network airlines and it’s happening at alarming levels.”

United president Scott Kirby called the activity “a responsive measure as opposed to a leading measure.” He added: “We can’t allow ourselves to lose share when our competitors are out trying to buy it.” While American and Delta saw commissions grow more modestly year over year during the second quarter, United has lagged its largest competitors in total agency commission expenditures, according to the DOT data. Of course, each carrier has different agency relationships, sales strategies, networks and revenue profiles, so the commission structures among each are not apples to apples. American’s commissions rose by just under 3 percent to \$123 million year over year during the second quarter, according to DOT data. Delta’s rose by roughly the same rate to \$155 million. In 2017, Delta’s commissions rose 7 percent year over year to \$602 million, while American’s rose 35 percent to \$480 million. In 2017, United’s agency commissions rose 9 percent to \$240 million, according to DOT figures.

In August, United’s Jake Cefolia, who will succeed Dave Hilfman as SVP of worldwide sales, talked about the airline’s evolving relationships with TMCs: “There have been a lot of changes relative to how airlines use TMC channels to distribute and to reach a market they can’t reach on their own. I think airlines are viewing TMCs as a proxy salesforce. I’ve got 725 people. Agencies have thousands if not tens of thousands of people who are talking to clients and prospective clients all the time. There has been a shift in view of the TMC channel as a proxy salesforce. Same as we’re trying to equip our sales people with more tools, we’re trying to equip our TMCs with more tools. That’s been an interesting transition that’s happened the past couple of years. We dipped our toe in the water and have liked what we’ve seen there.”

In the U.S., he said, TMCs have been a powerful ally extending United’s PerksPlus program that offers perks and soft dollar benefits to small and midsize companies. He sees even more of a role for agencies to play with United’s new Propel discount program for midsize corporations. “Across the board, we’ve been getting tremendous support from our TMC partners,” Cefolia said. “I feel like we’re entering a new period there. Historically, and this is going back many years ago, there used to be some antagonism there. It’s moved beyond that.”

CONTINUED FROM FRONT PAGE

First GDS NDC Transaction

transaction creates a passive segment in the GDS. “At most travel management companies, everything links off the GDS—most [management information] and invoicing. Then, if you’re linked to other things like International SOS, you have to do hand-offs. There is still a way to go to make it really fluid.”

In addition to working with Travelport on NDC, Boddy said, Meon Valley also receives content through aggregator Atrii and a number of carriers on NDC, “so we’ve been booking NDC for a while for our customers

through that channel,” said Boddy. “The thing is: It’s a separate system and, obviously, that increases process. At the moment, if you’ve only got certain content in one channel, you’ve got to do different searches in different places.” Boddy added that “an ideal world” would be single-source shopping and booking.

Like others, Boddy said it remains unclear where the economics shake out when transacting NDC content via GDSs. Non-GDS aggregator economics, deployed by the likes of Travelfusion, flip the flow to a TMC-pay model from a supplier-pay transactional

model. Travelport CEO Gordon Wilson is similarly uncertain on how the economic model evolves.

“There is a change coming up in all of this, but I don’t know what that will be,” said Boddy. “You have to pay for it through Travelfusion and other sources. How that looks through the GDSs, I don’t know.” He added: “Travelport is now in a position where they can make NDC bookings. They’ve done that. We’ve seen it. I suppose it all comes down to the commercial side for us to be able to go into a real live environment.”

Travelport noted that its NDC capability, demonstrated with Meon Valley, will extend to other agencies and airlines in coming months, “followed by a series of product enhancements, including a version for online agents in 2019.” Travelport’s largest competitors, Amadeus and Sabre, are testing NDC capabilities with TMCs and airlines, too. “We are still at the very earliest stages of NDC deployment,” Wilson said. “Its evolution will continue to take time as we learn from the practical experience of its first use.”



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Alaska to Sell Basic Economy

Alaska Airlines will begin selling its basic economy Saver fare this month, ahead of a wider rollout next year, executives said on the carrier's earnings call. With the Saver fare, passengers still will be allowed to bring a carry-on bag and personal item and, unlike on many other basic economy fares, still will earn the same mileage as standard economy fares. However, they cannot change or cancel the ticket, will board the plane last unless they have elite status and cannot select seats. EVP of planning and strategy Shane Tackett said the fares will be tested "in

a small subset of markets" in November and those tests will determine how widely they will be rolled out when they officially debut in January. In addition, Alaska Airlines is matching others' recent fee hikes for checked bags. All the largest U.S. airlines—save Southwest, which does not charge bag fees—already have instituted the hikes. For travel on tickets bought or exchanged on Dec. 5 or later, Alaska passengers will pay \$30 for the first checked bag and \$40 for the second. Currently, both a first and second bag each cost \$25. ■

Uber Was the Most Frequently Expensed Brand in Q3

Uber was expensed by businesses in North America more often than any other brand during the third quarter, according to Certify's latest SpendSmart report. The ridehailing service comprised 11 percent of the more than 10 million expense transactions Certify processed for the third quarter. Also among the most frequently expensed brands was Uber competitor Lyft, which cracked the top 10 for the first time, ranking sixth with 3 percent of transactions. Lyft's share of all the corporate ridehailing trips expensed inched up from 19 percent to 20 percent last quarter. However, Uber continued to dominate, accounting for 73 percent. Uber's share of overall expense transactions has nearly doubled over the past two years, according to Certify. Taxis remained at around 7 percent of rides hailed for the third straight quarter.

—Adam Perrotta

Lyft Launches Monthly Subscription Service

Lyft is making a monthly subscription service available across its user network in which users pay a flat fee of \$299 for 30 rides per month. Subscribers to Lyft's All-Access Plan can take 30 rides up to \$15 each; they pay the balance on any ride that costs more. Additional rides beyond the 30 also come at a 5 percent discount. Subscribers cannot share their rides between other accounts, meaning a travel buyer could not buy a subscription to be shared

Would a subscription offer savings?

Yes, if the user:

- uses the full 30 rides and those trips average at least \$10 each

or:

- takes at least 20 rides that cost \$15 or more

among his or her company's traveler base, according to a Lyft spokesperson.

Lyft has been piloting the program with an invitation-only group since March and Uber has introduced a pass program to select users, but Lyft now is the first ridehailing network to offer such a subscription service across its network. ■

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TravelPerk Will Use Its War Chest for Three-Year ‘Race for Market Share’

BY AMON COHEN

Not content with having raised \$21 million in Series B investment in April 2018, new-gen travel management platform TravelPerk has successfully passed the hat around a second time in the same year. The company has drummed up Series C funding of \$44 million, backed by technology investors such as Kinnevik, Yuri Milner and Tom Stafford. The latest funding continues a pattern of strong investment growth, following TravelPerk’s \$21 million Series B round in April and a \$7.5 million Series A round in 2015.

Not bad for a business that only launched in 2015 and remains far from a household name among travel managers. Barcelona-based TravelPerk is one of a gaggle of startups positioning themselves as disruptors aiming to blow established travel management companies and booking tools out of the water with what they claim is more consumer-friendly technology.

The additional funding spares TravelPerk from immediately having to chase short-term profitability. “We plan at some point to make a profit, but we are in a fast-growth environment,” chief commercial officer Jean-Christophe Taunay-Bucalo said. “At the moment, what we and our investors have agreed on is that the next three years will be about market growth. But we make money on every booking. The fundamentals of the business are really good. When we want to turn a profit, we will.”

But what else does TravelPerk, which claims to be “Europe’s fastest-growing Software as a Service company,” want with all the cash? “We consider that from both a product and marketing standpoint, the next three years will define the winners, so it’s going to be a race for who will take enough market share to have purchasing power and branding awareness,” said Taunay-Bucalo. “That’s why we wanted to go early: so we could prove we will be one of the leaders in the market.”

His remarks prompt a second question: Why should the next three years be radically different in the unfolding history of travel management? “I’m sure you have seen periods when revolutions have been announced and then you see nothing,” said Taunay-Bucalo; many veterans of the 1990s dot.com bubble and the noughties’ GDS New Entrants will nod assent. “But we do believe there is a combination of signs now that makes it really easy for [digital booking platforms] to take over [from TMCs]. There is a shift in the behavior of the business traveler from using travel agencies to using consumer tools, and we want to ride this wave because we mix the user interface of consumer tools with the service and compliance of business tools. We feel this is going to become the standard in the very short-term future. We don’t believe that the travel agency in the current model will last much longer than three or five years.”

Added to that, said Taunay-Bucalo, “is the change in supply [and distribution]. For us, it’s very easy to integrate [New Distribution Capability] because we are a tech company. It’s what we do every day. Traditional TMCs struggle way more than we do with technological shift.”

The press release announcing TravelPerk’s Series C funding emphasized the use of new money to open offices in London, Berlin, Amsterdam and Paris. The new premises are intended partly to handle the 5 percent of TravelPerk’s bookings not

transacted online, primarily complex air itineraries. But Taunay-Bucalo said that while investing in customer support is important, the lion’s share of fresh funding will be spent on platform development, “especially to go faster and deeper with all the integrations we have with hotels, flights, trains and very likely car rental next year.”

One-third of bookings through TravelPerk, which has its own International Air Transport Association accreditation, are via global distribution systems. That figure rises to 50 percent when other aggregators such as Travelfusion—which pipes much of TravelPerk’s rail content, as well as some air—are taken into account. The remaining 50 percent is booked via application programming interfaces TravelPerk has built, and the company wants to increase that figure wherever it believes going direct will extend inventory and secure the lowest price.

TravelPerk’s philosophy is remarkably similar to that of TripActions, another startup that has attracted heavy financial backing and one that Taunay-Bucalo admires. But he doesn’t view TripActions as a rival—at least, not yet. “People like TripActions are probably our closest competitors, but we never come up against them,” he said. “Customers which move to us either had no systems so they booked by themselves online or on a site like Skyscanner or they used a traditional travel agency.

“It’s a bit of a paradox because people like us and TripActions will be the future winners of this

TravelPerk’s Evolution

Launched in 2015 as a savings incentive tool for business travelers, TravelPerk soon pivoted to reducing out-of-policy bookings for corporate clients via an online booking and travel management platform. That mission has paid dividends, as the company increased revenue by an average of 700 percent over the past year, growing its client base to more than 1,000 companies and tripling the size of its team, according to the company.

—Adam Perrotta

market, and there will be a time when we compete head to head, but for the moment the key move we are both trying to do is shift people to using travel management software, a category that until a couple of years ago didn’t exist, other than Egencia maybe.” ■

Highest-Risk Countries for Travelers

BY DAWIT HABTEMARIAM

Drum Cussac ranked Syria the riskiest country in the world on its 2019 World Risk Map, based on 20 risk markers grouped under five categories: security, political, medical, environmental and infrastructural. The Middle East and North Africa is the riskiest region, heavily represented among the 10 riskiest countries:

- | | |
|----------------|---------------------------------|
| 1. Syria | 6. Somalia |
| 2. Yemen | 7. Central African Republic |
| 3. Afghanistan | 8. Iraq |
| 4. Libya | 9. Democratic Republic of Congo |
| 5. South Sudan | 10. Burundi |

North and Central Africa had notably high levels of infrastructural, environmental and medical risk. Drum Cussac

said diseases like malaria, cholera and typhoid, along with poor access to medical facilities and medication, form a threat there. Additionally, poor aviation safety standards and large areas of poorly maintained roads pose challenges to mobility. Another threat is the growing lawlessness in parts of the Democratic Republic of Congo and neighboring areas, as criminals and militias are taking advantage of fractured governments.

Aruba was classified as the least risky country. Among countries with populations of a million or more, Taiwan and Uruguay were the lowest risk, which Drum Cussac attributed to political stability and relatively strong economies. ■

Travel and Transport Assumes Full Ownership of Radius Travel

BY MICHAEL B. BAKER & JAY BOEHMER

Travel management company Travel and Transport has fully acquired global travel agency network Radius Travel, having completed the process over the past few years of buying out the network's other two owners. Before closing the latest transaction, Travel and Transport already had a controlling, majority stake in the Radius network, which includes more than 100 TMCs across the globe that partner to acquire and serve clients in markets individual agencies do not reach on their own.

The network will globalize some of Travel and Transport's technology and tools, said Radius president and CEO Shannon Hyland, who becomes Travel and Transport SVP of global services. Radius already assists with global data consolidation among network members, and it manages several shared technologies that member agencies can adopt when working together to serve a client, including mobile tools, profile systems, data management tech and risk management systems.

Execs see further opportunities for commonality and collaboration where applicable. Travel and Transport CEO Kevin O'Malley referenced content aggregation, including New Distribution Capability-type airline distribution, as well as other areas where Travel and Transport has already invested. Travel and Transport operates proprietary technology in mobile, customer relationship management, client portals and agency desktop systems. It could look to extend such capabilities and systems to members where applicable. "T&T has invested a lot in its own proprietary technology," said O'Malley. "To the extent that it benefits members, how do we leverage it into the network? There will be a lot of those things that we'll be figuring out in the coming years."

He added: "When you own part of something, you have to deploy a dual strategy. You have to think: What do you do on the Travel and Transport side, and what do you do on the Radius side? Now, being the 100 percent shareholder, you will see us put a lot of time, money and effort into Radius and the network."

As airline and hotel supply has become increasingly concentrated via consolidation, Travel and Transport and Radius will leverage the combined spend to yield better content and supplier deals for members. "From a Travel and Transport perspective, there has been a partition for many of the deals because they have been Travel and Transport-specific deals and Radius had Radius-specific deals," said O'Malley. "Going forward, we will leverage the combined volume, which collectively is over \$33 billion in [annual] travel spend, to try to get as many deals into the network as we can for the benefit of the network. There will still be some deals that suppliers are not going to give broad based, but there are some where we expect they will give broad based to a 100 percent-owned network. To the extent we can benefit T&T and the network, we're going to try to."

Hyland noted: "We certainly are going to be in a position to better leverage Travel and Transport's scale now that we are a subsidiary, and it will better position us with suppliers and third-party technology providers. Our place in the industry is more fortified." O'Malley said investments would focus on "proprietary Travel and Transport tools," including "what we can do as far as creating more commonality on the platform, aggregating content and solving NDC as it continues to evolve."

RADIUS' EVOLVING LOOK

Radius over the years has moved away from its original business model. The shareholder model, in which all members had a share in the company, had become "a bit unwieldy to manage," Hyland said. In 2011, a large investment consolidated more than 80 percent of Radius to three owners: Travel and Transport, India-based Cox & Kings and U.K.-based Portman Travel. Travel and Transport has been working toward full ownership of Radius since 2015. It completed the buyout of Cox & Kings' shares in September and had bought Portman's

shares a few years prior; Portman merged with Clarity Travel Management in 2016.

Hyland said Travel and Transport was "the most obvious candidate" for sole ownership, as it "has had a longtime interest in Radius as a shareholder and member and has been a very successful company and will continue to be a successful company for years going forward." He continued: "As we were working on our strategic plan in 2015, we saw what was going on in the industry, which continues to go on today: the incredible pace of consolidation, with suppliers getting more scale. We thought it would be in our best interest, to make sure Radius would continue to thrive 10 years down the road, to align with a TMC."

Radius' headquarters will remain in Bethesda, Md., and chief commercial officer Kieran Hartwell becomes president. Hyland said, "Radius will continue to maintain firewalls between Radius as the subsidiary and Travel and Transport as the parent company. We've got those firewalls today and have a lot of experience working in that kind of environment."

Going forward, Travel and Transport's multinational strategy will be Radius-first, as opposed to an owned presence in new markets. "You'll see our primary focus going into Radius now," said O'Malley. "As long as we have strong network partners in-market, which we do, if we can make the right investments in technology and have a unified strategy, we like that model. We think it gives us the ability to service the customer extremely well and win multinational business." Travel and Transport president and COO Tim Fleming said, "We've got a really good group of members in the U.S., a lot of specialties within those groups and a lot of positive things and sales growth happening. We're dedicated and committed to a continued strong network of agencies in the U.S. to complement Travel and Transport." ■

‘Faster Airport Security, You Say? Sure, I’ll Share My Personal Data,’ Plus More Traveler Opinions

BY DAWIT HABTEMARIAM

Sixty-five percent of air passengers are willing to share personal data if it would expedite the security process, according to the International Air Transport Association’s 2018 Global Passenger Survey. Following are more insights IATA gleaned from its survey of 10,408 air passengers from 145 countries between April and July 2018.

Post-Booking Communication. Post-booking, passengers’ top priorities were receiving information about flight statuses (82 percent), about baggage (49 percent) and about wait time at security and immigration checkpoints (46 percent). Almost three-quarters prefer to receive travel information via SMS or smartphone app notifications. Fifty-six percent said they preferred real-time baggage tracking.

Check-In. Eighty-four percent of passengers prefer automated check-in. Forty-seven percent prefer to check in on smartphones and 16 percent prefer to check-in with an agent at the airport counter. Senior citizens were more likely to prefer the airport counter more, as one-quarter said so. Seventy percent of passengers want self-service baggage check. Thirty-nine percent favor electronic bag tags that contain passengers’ itineraries. Only one of three prefer agents to tag their bags.

Security & Boarding. Removing personal items from baggage at security checkpoints frustrates 57 percent of air passengers, while 48 percent are frustrated by removing laptops and large electronic devices and 41 percent dislike the lack of consistency in screening procedures at different airports. Top desires among passengers were more efficient queuing at boarding gates (64 percent), overhead space on planes (42 percent) and not having to queue on the air bridge (33 percent).

Flight Disruptions. Forty percent want to resolve flight disruptions over the phone, while 37 percent prefer face-to-face interaction. To improve the travel disruption experience, 54 percent would like real-time, accurate travel notifications; 46 percent want automatic rebooking with new boarding passes; and 39 percent desire face-to-face interaction with an airline agent who will arrange further travel details. ■

45%
of air passengers are willing to replace their passports with biometric identification.

Hyper-Focus on Costs Hurt Attrition, According to a Recent Survey

BY MICHAEL B. BAKER

Travel programs that focus primarily on cost pose a higher risk of attrition and a lower success rate, according to a survey of 742 U.S.-based road warriors conducted May 7 through 17 and sponsored by Airlines Reporting Corp., Delta, Flight-Global and tClara. Respondents spent at least 35 nights away from home while traveling for work in the course of a year.

These business travelers were twice as likely to consider leaving a job when under a cost-focused program rather than a traveler-focused one. About a third of travelers under cost-focused programs were considering leaving their jobs over the next two years, compared with 17 percent of those under traveler-focused programs.

In addition, travelers under cost-focused programs were less likely to report their trips as successful. Those travelers reported 57 percent of their trips as successful, compared with 66 percent of trips for travelers in traveler-focused programs.

Overall, 91 percent of travelers in traveler-focused programs were satisfied with their travel policies. Only 59 percent of travelers in cost-focused programs said the same.

Among the report’s recommendations to increase success rates and decrease attrition risk:

- Allow business class on flights longer than six hours.
- Encourage frequent travelers to use less personal time for business travel.
- Help travelers get better sleep while on the road. ■

What Business Travelers Want

Convenient travel times and hotel locations were more important than flying business class or earning loyalty points, according to an Egencia survey of more than 5,500 business travelers in North America, Europe and the Asia/Pacific region.

Business travelers were particularly motivated to arrange travel options that enable them to save time and arrive well-rested; 30 percent cited travel times that work best for their schedules as being of utmost importance when booking. Convenience remains key after travelers arrive at their destinations, too, as 31 percent

cited a convenient and safe location as their top priority when choosing a hotel.

Corporate travelers also value control, as 48 percent said the most important element of a corporate travel program is the ability to control booking themselves, including initial booking and any subsequent changes. Specialized customer support ranked a distant second, at 15 percent. A whopping 90 percent enjoy traveling for work, and most claimed to be diligent in following their travel policies. Eighty-two said they always book within policy, though U.S. workers were notably less

diligent—or more honest—in that area, as only 62 percent claimed always to be compliant. The most common violation was advance booking; about half said they weren’t always able to book far enough in advance to comply with policy.

The most common complaint was the impact of cost controls on the quality of lodging available, cited by 31 percent. Limited upgrade options and the inability to add perks like airport lounge access or expedited airport security ranked next.

—Adam Perrotta

NYU Analysis Outlines Differing Perspectives for 2019 Rate Negotiations

BY JULIE SICKEL

With the hotel sourcing season for 2019 corporate negotiated rates well underway, it's expected that U.S. corporate rates will increase between 2.5 percent and 3.5 percent next year, according to an analysis from New York University's Bjorn Hanson.

Hanson, an industry consultant and adjunct professor at the New York University School of Professional Studies Jonathan M. Tisch Center for Hospitality and Tourism, said both buyers and sellers went into this negotiation season from perceived positions of strength. Hotels entered with expectations of increases in the 4 percent to 5.5 percent range, and corporates entered expecting increases of 1.5 percent to 2 percent.

For hoteliers, occupancy is the highest it's been since the early 1980s. Though they've struggled to leverage that to drive significant

rate growth in recent years, average daily rate is increasing more in 2018 than it did in 2017—between 2.5 percent and 3 percent this year—and that trend is expected to continue in 2019. Group demand, Hanson noted, has already increased more this year than previously forecast.

The hotel industry's inability to grow rates as expected in recent years is no secret to travel buyers. Hanson said, many feel they overpaid between 2016 and 2018 by submitting to greater corporate rate increases than the industry was able to realize overall. To illustrate the industry's slow rate growth, Hanson pointed out that the last time occupancy was above 66 percent, as it is now, average daily rate increased 12 percent—9.5 percent over the rate of inflation. In 2018, rate is expected to increase by only 0.5 percent to 1 percent over inflation. Another benefit to buyers is the growing range of hotel alternatives, including Airbnb, which has been gaining acceptance in the corporate travel market.

Another factor impacting the 2019 hotel negotiation season is concern around member rates and nonrefundable rates from brand.com websites that, though aimed at cutting into commissions paid to online travel agencies, are sometimes lower than corporate, contract or convention rates. Services and amenities, which have been a major negotiating point in the past, have been less of a priority this year.

Hanson also highlighted the growing trend of a new fee or surcharge that's becoming common for upper-upscale and luxury urban hotels—appearing as an “amenity,” “facility” or “service” fee. During a recent BTN Group Business Travel Trends and Forecasts event in Seattle, one buyer noted the emergence of such fees, particularly at hotels in New York City. “If you're not paying attention to it,” she said, “if you don't have the ability to evaluate your total cost of hotel spend, these things can really add up.” Hanson said buyers who have caught the change are requiring contract wording that prohibits such fees. That same buyer in Seattle, who preferred not to be named, instructed peers to dig down and look for the fees in what they're paying to hotels because “it's very buried.”

U.S. Hotel Fees & Surcharges Projected to Hit \$2.93B in 2018

Fees and surcharges at U.S. hotels are expected to hit a record \$2.93 billion this year, according to analysis from Bjorn Hanson, industry consultant and adjunct professor at the New York University School of Professional Studies Jonathan M. Tisch Center for Hospitality and Tourism.

The forecast follows the record \$2.7 billion reached in 2017, marking an 8.5 percent increase from 2017 to 2018. This year's climb is driven by a 2.5 percent year-over-year increase in occupied hotel rooms, plus additional fee and surcharge categories.

Historical View

2018	\$2.93 billion (forecast)
2017	2.7 billion
2016	2.6 billion
2015	2.45 billion
2014	2.35 billion
2013	2.1 billion
2012	2 billion
2011	1.85 billion
2010	1.7 billion
2009	1.55 billion
2008	1.75 billion
2007	1.75 billion
2006	1.6 billion
2005	1.4 billion
2004	1.2 billion
2003	1 billion
2002	0.55 billion
2001	1 billion
2000	1.2 billion

Hanson detailed the emergence of urban hotel fees in his recent report about 2019 corporate rate negotiations. These fees, he said, are similar to resort fees and are now common in major cities, averaging between \$20 and \$40. “The practices for disclosure are evolving, different than for most resorts charging resort fees,” the report stated. “Sometimes these are shown as part of the ‘total’ cost of occupancy to a guest rather than as a specific extra charge. The services related to these fees and surcharges range from no new services to planned or unscheduled activities such as visits to local attractions, receptions, and printing, copying, overnight package delivery, ‘complimentary’ bottled water, newspapers and early or late check-out if not in conflict hotel occupancy, and others.”

Urban resort fees account for the largest share of the this year's fee and surcharge increase, despite the industry's adoption of harsher cancellation penalties. In 2017, a number of hoteliers—including Marriott International, Hilton and Hyatt Hotels Corp.—put in place 48-hour to 72-hour cancellation penalties. Enforcement of these penalties varies by market and hotel, Hanson said. Though U.S. hotel fees and surcharges have increased every year since 2010, recent additional fees appear to be linked to a lack of pricing power in the industry, as rate increases fail to keep pace with higher costs for hotels.

Other fees that have emerged or accelerated in recent years include charges for early check-in, most common at resorts and particularly in Las Vegas, as well as fees for unattended surface parking

in suburban locations and for holding checked luggage.

Hanson expects 2019 will mark another record year for fees and surcharges, with the largest percent increase to come from service and amenities fees, i.e., urban resort fees. The report is based on discussions with lodging industry executives and corporate travel executives, analysis of industry financial data, press releases and information available on hotel and brand websites.

Corporate Negotiated Rates' Shrinking Share of Demand

Hanson's analysis detailed the declining share of corporate negotiated rate demand as a portion of total hotel demand. For decades, he said, corporate and contract rates have comprised about 20 percent of U.S. occupied room nights and almost 30 percent of U.S. lodging revenue. Since the 2009 recession, however, negotiated corporate demand's share has been shrinking. Though specific data for corporate negotiated rate demand is unavailable, estimates peg those shares at 15 percent of occupied U.S. room nights and 25 percent of U.S. lodging revenue.

There are two major culprits behind the shift, Hanson said. First is travel programs' growing embrace of open booking, allowing travelers to book non-negotiated hotel rates. "It's trying to be responsive to, especially, younger travelers who say, 'I'd rather stay in a \$120 hotel of my choice than your \$220 good deal. I can be happier and spend less,'" Hanson said. Second, leisure demand has been growing faster than corporate negotiated demand since the recession, suggesting that while the pie has gotten larger for occupied room nights and revenue, corporate negotiated makes up a more modest piece than it once did. "When we read headlines about the growth in corporate meeting demand, well, it's better than it was but it's not back to where it was [pre-recession]," Hanson said. "There continues to be downward pressure on the amount of travel and traveler budgets within companies."

Other influences, Hanson said, are changing behaviors around customer relationship management—which have resulted in fewer face-to-face meetings and more engagement through digital channels—and the shrinking appeal of business travel for the current workforce as a whole. "The glamour of business travel isn't what it used to be," Hanson said.

His report and estimations are based on selected discussions with industry executives and corporate travel executives, analysis of industry financial data, press releases and information available on hotel and brand websites. ■

For decades, corporate & contract rates have accounted for 20% of U.S. occupied room nights. Estimates peg that figure now at 15%.

Uber Adds Uber Eats to Business Platform

BY MICHAEL B. BAKER

Uber has launched a business management offering for its Uber Eats food delivery service as part of the Uber for Business platform. Uber Eats, a separate app that provides delivery service from participating restaurants, launched in 2014. It has grown to about 350 markets in 35 countries, said Uber Eats head of product and senior director Stephen Chau. Businesses also are using Uber Eats more; year to date, the orders expensed in SAP Concur have risen 700 percent year over year, he said.

As such, Uber has developed Uber Eats for Business, in which companies can set controls and get reporting around Uber Eats use. For example, program managers can set price caps for orders or determine which employees are allowed to make orders, Uber for Business lead Ronnie Gurion said.

They also can set different parameters for different use cases, he said. For example, they could set up an after-hours food delivery program for employees who stay at work late, restricting orders to a certain geography and to certain hours. For employees who use Uber Eats to order food in a hotel while traveling, a company could set up a different program that does not have those restrictions.

Once the tool determines an order is in policy, Uber Eats for Business bills it centrally to the company, Gurion said. The service also provides its customers reporting on their spending.

Uber has been testing the service with about 100 customers and is now making it widely available, he said. ■

Incentive Travel Buyers Become More Cost-Conscious

BY ADAM PERROTTA

Corporate incentive travel budgets are on the rise, but buyers are increasingly cost-conscious, according to the 2018 Incentive Travel Industry Index, produced by the Incentive Research Foundation, Society for Incentive Travel Excellence and Financial & Insurance Conference Professionals and produced with J.D. Power. The study canvassed nearly 400 buyers worldwide.

More than half of incentive travel buyers, 54 percent, reported an increase in corporate budgets for incentive travel in 2018. Median per-person spend averaged \$4,000, steady from last year and up \$1,000 from 2016.

Despite rising budgets, incentive travel buyers increasingly are controlling costs. In 2015, 72 percent of buyers took steps to reduce costs, and in 2018, 82 percent did so. Additionally, all-inclusive resorts are gaining popularity as buyers seek lower-cost trips. "Although the findings show that incentive travel is growing, the reality is that there are countercurrents, such as rising costs, that may temper growth," said IRF president Melissa Van Dyke. "Planners are taking steps to contain costs, such as less expensive destinations or less expensive amenities."

Destination appeal rated as the top criterion for choosing a location, followed by overall safety and value. North America, the Caribbean and Western Europe ranked as the most popular destinations.

Nearly 70 percent of buyers said their programs achieve business objectives and positive ROI; increased sales and profitability ranked as the top objectives for incentive travel programs. However, other motivating factors are gaining ground, including building relationships between management and employees and increasing productivity and employee engagement. ■



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Amadeus is powering a smarter way to manage business travel and expense for corporations. We help you not just process your costs once they happen, but influence your spend at the booking stage, while providing the best traveler experience. This guarantees high adoption rates and policy compliance. To do so, we are building the Live Travel Space centered on our technology and people.

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- Our people from across the world that work with 15,000 corporate customers, supporting them to grow and evolve their businesses by ensuring that travel delivers maximum value.

Open, connected, dynamic are the attributes that define Live Travel Space. We deliver transparency and neutrality. We work with all players across the travel ecosystem. We empower travelers with better journeys by deploying our wide network. We continually innovate by updating our platform with new content and functionality every six weeks.

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American Airlines

We understand the job of a travel manager is never done, and here at American, it's our duty to support you as you support your travelers. With the largest network in the world, a knowledgeable sales force, 24/7 support and enhanced products and amenities, we're making travel an even better experience for you and your travelers.

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We also know the journey is just as important as the destination. We're investing in the customer experience, from airport enhancements, to new planes and top-notch premium services. Travelers can enjoy a modern experience with fully lie-flat seats in First and Business Class, Wi-Fi, inflight entertainment and chef-inspired menus. On the ground, we're offering groundbreaking new options before takeoff with our new Flagship® Lounge and Flagship® First Dining. With every carefully considered detail your travelers might forget they're flying.

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Avis Budget Group, Inc. is a leading global provider of vehicle rental services, both through its Avis and Budget brands, which have more than 11,000 rental locations in approximately 180 countries around the world, and through its Zipcar brand, which is the world's leading car sharing network, with nearly one million members. Avis Budget Group operates most of its car rental offices in North America, Europe and Australia directly, and operates primarily through licensees in other parts of the world. Avis Budget Group has approximately 30,000 employees and is headquartered in Parsippany, N.J.

More information is available at www.avisbudgetgroup.com or follow us on Twitter @AvisInnovation.

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BCD Travel

BCD Travel helps companies make the most of what they spend on travel. For travelers, this means keeping them safe and productive, and equipping them to make good choices on the road. For travel and procurement managers, it means advising them on how to grow the value of their travel program. In short, we help our clients travel smart and achieve more. We make this happen in 109 countries with almost 13,500 creative, committed and experienced people. And it's how we maintain the industry's most consistent client retention rate (95% over the past 10 years), with 2017 sales of US\$25.7 billion.

www.bcdtravel.com



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Booking.com for business is a tailored offering specifically focused on business bookers and travelers to allow seamless booking and managing of business travel in the simplest, smartest and most rewarding way. More than one in five bookings made on Booking.com are made for business. Enhanced features for business travel on Booking.com highlight those places which are frequently used for business, tapping into its extensive review data to make easy work of finding those that are business traveller tested and approved. Booking.com for Business is a platform designed to meet the specific needs of corporate travel, while delivering the same ease as Booking.com.

www.business.booking.com



Choice Hotels

Choice Hotels has become a growing force in business lodging by focusing on what corporate travel buyers and counselors really need: Brands they can confidently recommend, locations in most major business markets, real value to help minimize clients' total cost of travel, business essentials like breakfast and free Wi-Fi, and perks to help keep travelers feeling happy, productive and rewarded when they stay.

We may not be the hotel brand you think of first when it comes to corporate travel, but if you think you know Choice Hotels, you should think again.

We've expanded our footprint of upscale brands, now with over 250 Cambria® and Ascend Hotel Collection® properties across the US. Likewise, we've upped the game of our midscale brands that are already iconic amongst guests.

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www.choicehotels.com



Chrome River

Chrome River Technologies, Inc. lets business flow for some of the world's largest and most respected global organizations. Our highly-configurable cloud-based expense reporting and supplier invoice automation solutions deliver an elegant and intuitive user interface, which offer the same high quality experience on a smartphone, tablet or laptop. Our SaaS products provide a world-class business rules engine and technology infrastructure, combined with a completely agile solution that supports today's changing business climate, and that CFOs, AP and travel managers, and employees will all love.

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

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For the advancement of business travel

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CSI Travel

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www.corporatespending.com/corporate-travel



Cvent

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

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HRS simplifies business travel. Corporate travel managers and business travelers around the world trust HRS to find the best accommodation and simplify all processes related to their business travel. More than 3,000 multinational corporations rely on HRS for some element of their hotel program, including Fortune 500 companies Alibaba, China Mobile, Daimler, Google, Siemens and Volkswagen. Beyond ongoing global growth, HRS is gaining momentum in North America. After launching with its New York office in 2015, the company opened offices in Dallas and San Francisco in 2018. HRS has already signed more than three times as much business in the first seven months of 2018 as it did in the entirety of 2017.

In addition to professional hotel sourcing and the negotiation of corporate rates with hotels, HRS optimizes paperless payment of hotel accommodation and meetings as well as automated invoice processing. HRS pursues clear goals: savings and transparency for companies and high traveler satisfaction. Founded in Cologne in 1972, HRS today has more than 1,500 employees in 35 offices worldwide, including London, Paris, São Paulo, Shanghai, Singapore and Tokyo.

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Hilton

Conrad Hilton's dream began with a 40-room hotel in a small Texas town in 1919. Today, Hilton brings the light and warmth of hospitality to more than 5,500 hotels with nearly 895,000 rooms across 109 countries and territories. With 15 distinct brands that meet the needs of every traveler, from business to leisure, luxury to family-friendly, we delight our guests and reward our partners. How? With a devoted team, original programs and best-in-class services—all designed to deliver an exceptional experience to every guest, every time. Explore:

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- New, authentic brands: Motto by Hilton, Curio A Collection by Hilton, Tapestry Collection by Hilton and Tru by Hilton.
- Travel with Purpose, our global hospitality mission to strengthen communities and protect the environment. Hilton is committed to cutting our environmental footprint in half, and doubling our social impact benefitting communities by 2030. Discover more about the fastest-growing company in hospitality at Hilton.com.

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www.omnihotels.com



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Radisson Hotel Group is one of the world's largest hotel groups, with eight distinctive hotel brands made up of more than 1,400 hotels in 114 countries around the world.

Radisson Hotel Group is built on the equity and global awareness of our leading brand, Radisson®, to drive awareness and increase marketing efficiency across the global portfolio. Radisson Hotel Group brings a refreshed commitment to hospitality leadership to meet the changing travel industry and the bespoke needs of our guests.

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www.radissonhotelgroup.com



Red Lion Hotels Corporation

Red Lion Hotels Corporation is an innovative hotel company doing business as RLH Corporation and focuses on the franchising, management and ownership of upscale, midscale and economy hotels. The company focuses on maximizing return on invested capital for hotel owners across North America through relevant brands, industry-leading technology and forward-thinking services.

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Love It: Great rates, great points, great experience. Finally, a hotel program you, your travelers, and your boss can love.

Find it. Book it. Love it. RoomIt.

www.roomit.com



Sabre

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Sabre provides best-in-class corporate travel management solutions designed to help you achieve a global, end-to-end travel program, with the flexibility to fit your unique needs, the innovative mindset to keep you ahead of the curve and the global leadership and travel industry expertise to ensure you achieve success with your corporate travel program.

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Accessibility to mobility is freedom. The freedom to experience and share the world with others, and to overcome barriers of thought and opinion. By constantly challenging the status quo and with the drive to get things done, our worldwide Sixt family with more than 6,000 members is working towards a future in which people around the globe have access to safe, efficient and comfortable mobility with the touch of a button. All our mobility products in one single app—whether it is for 6 minutes, 6 hours or 6 months. The world's largest mobility fleet with more than 250,000 cars in over 125 countries is available precisely when and how you need it. A vehicle that may be driven by you, by a driver, or perhaps driven of its own accord. One brand, one company, all solutions. We are generating revenues of more than 2.6 billion Euros making Sixt the largest integrated mobility provider. Our motivation is you, our customer, because we know that good is not good enough if better is expected. You are the most important person in our business. Everything we do, we do for you in order to create a product that excites and moves. Mobility is not just freedom—it's Sixt.

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For the advancement of business travel

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www.southwest.com



TAP Air Portugal

TAP Air Portugal is the leading airline in operation since 1945 and a member of the Star Alliance since 2005. Shortly after having celebrated 70 years, TAP completed its privatization in 2015 bringing a new and exciting future.

TAP's Lisbon hub is a key gateway to Europe and Africa. With TAP's Portugal Stopover program, travelers can experience two destinations for the price of one. Whether flying to a destination in Portugal, or to one of our 92 destinations throughout Europe and Africa, passengers can enjoy up to 5 nights in Lisbon or Porto at no additional airfare.

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TAP is also the first airline to fly the new A330neo, equipped with AirSpace by Airbus interior cabin concept that provides TAP passengers with a new travel experience focused on greater comfort, better service and a modern design. By 2025 TAP will have 71 new fuel efficient and ecofriendly aircrafts.

www.flytap.com



Tramada

Tramada is an advanced platform that streamlines travel operations, data management, document production, and travel accounting. We're the underlying infrastructure that makes the cool stuff possible. Tramada is GDS agnostic, NDC capable and integrates with over 50 products, including online booking tools, mobile solutions, and expense systems. The plug and play design makes it easy to add the latest applications while automated features increase revenue and drive down costs. Tramada Systems has long been the leading provider at its home in Australia and is quickly gaining recognition and adoption in North America. At Tramada, we're travel insiders passionate about making innovation and the growth of your business easy.

www.tramada.us



Travel and Transport

Founded in 1946, Travel and Transport, Inc., is one of the largest travel management companies in the U.S. specializing in corporate travel management, leisure/vacation travel and group/meeting travel services. Travel and Transport currently has over 1,600 employee-owners in seven countries. We are recognized for unparalleled service, integrity and industry-leading technology solutions. Customers partner with Travel and Transport to consolidate and manage their travel programs, improve service levels, reduce operational costs, leverage their purchasing power and enable compliance.

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

www.travelandtransport.com



Travel Incorporated

Travel Incorporated focuses on delivering the very best in business travel management. We live by the fundamental principle of the importance of listening to our customers and tailoring a travel program that blends your unique corporate culture with your company goals. By partnering with TI, you will receive passionate, empowered associates who deliver the absolute best in customer service, an in-house digital technology division that develops self-service tools and services ahead of the trend, and receive double digit year-over-year cost savings.

TI provides: Graphical Data Analytics and Dashboard Reporting Tools, Consolidated and Highly Personalized Global Travel Services, Industry Leading Self-Service Mobile Technology and Artificial Intelligence, Responsive Duty of Care Tools and An Approach to Business Travel that Embraces Disruption and Leads in Change Management.

www.travelinc.com



Travel Leaders Corporate

Travel Leaders Corporate combines complete travel fulfillment, data-driven insights and strategic meetings management to simplify the complexities of business travel. All of our offerings are backed by Travel Leaders CONNECT, our award-winning mobile communications platform that turns travelers' phones into highly effective, all-knowing travel managers. We are the only comprehensive corporate travel management team that connects global service with groundbreaking technology and analytics to provide actionable, data-driven insights and bring instant value to your travel spend and experience, all while leveraging our parent company's powerful industry relationships to generate an ROI of at least 3-to1 for your company.

www.travelleaderscorporate.com



Traxo

Traxo provides comprehensive travel data aggregation solutions for Corporations, TMCs, Expense Management, and Duty of Care service providers, empowering them to capture off-platform bookings, gain visibility into blind spend, and track travel activity—regardless of booking channel.

For corporate travel managers seeking to corral off-channel bookings, Traxo CONNECT is for you. With a user-friendly admin dashboard that aggregates all your employees' itinerary information—from any source—you can quickly see who is traveling where, download spend activity reports, and integrate data into your preferred Expense Management, Duty of Care, TMC or other managed travel applications. Gain visibility into your complete travel program behavior to better manage supplier negotiations, streamline traveler support, and stay on top of your spend.

For TMCs, Expense Management applications, and Duty of Care service providers, Traxo CAPTURE provides sophisticated data aggregation tools to help you access critical travel itinerary and spend data for your clients. From email parsing to inbox scanning and more, Traxo CAPTURE enables you to import itinerary and spend data from off-platform channels for integration into your own applications. Help your customers see what they are missing.

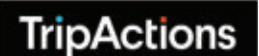
www.traxo.com



TripActions

At TripActions, we believe nothing can truly replace the value of being there in-person. So we built an end-to-end travel platform to make business travel as easy as possible for road warriors. TripActions travelers enjoy personalized results to book a trip in minutes, a wide selection of flights, hotels and transportation, and proactive 24/7 support to help when plans unexpectedly change. We merge company priorities with traveler needs—customers save an average of 34 percent on their travel spend, and travelers give TripActions a 97 percent satisfaction rating. Find out why leading companies such as Lyft, Dropbox, Robinhood and SurveyMonkey rely on TripActions for their business travel.

www.tripactions.com



Tripbam

There's an easier way to manage and optimize your hotel program. TRIPBAM's hotel re-shopping solution provides peace of mind to travel managers that the rate booked at a hotel is the lowest available rate—either at the same hotel or a nearby hotel at the same quality or better—and helps improve hotel program compliance and increase attachment. As lower rates are found, notifications can be sent to the traveler for approval or automatically rebooked.

Launched in August 2018, TRIPBAM's Hotel Intelligence offering is a first of its kind solution that allows travel managers to benchmark their existing hotel program against companies of similar size, compare chainwide, dynamic, and static discounts, accurately measure and grade overall hotel program performance on an A-F scale, and find and add new properties to their program based on best available negotiated rates and LRA performance. Clients utilizing TRIPBAM Hotel Intelligence realize 8-10% overall hotel program savings.

www.tripbam.com



Turkish Airlines

Flying to more countries and international destinations than any other airline in the world, Turkish Airlines has a network of more than 300 destinations in 122 countries on five continents, with an ever-expanding and one of the youngest fleets of the world that currently consists of 325 aircraft. Turkish Airlines is the best way for business travelers to access the world's largest flight network through a centrally-located hub at the crossroads of Europe, Asia, and Africa.

Turkish Airlines provides a seamless door-to-door experience to more than 40 countries in less than 3 hours from Istanbul, while offering direct connections to 8 countries and 17 cities in the Americas, including New York, Los Angeles, Houston, Chicago, Washington, Boston, San Francisco, Miami, Atlanta, Toronto, Montreal, Buenos Aires, Sao Paulo, Bogota, Panama, Caracas, and Havana.

By combining one of the widest flight networks of the world with one of its most extensive corporate frequent flyer programs, the Turkish Airlines Corporate Club is designed to solve business travelers' needs with benefits including exclusive upfront discounts, special baggage allowance, free tickets and upgrades when reaching an annual target, no penalties applied when not reaching targets, flexibility of changes/cancellations without penalty, access to award winning business class lounges, and a special help desk exclusively for Corporate Club members and Travel Management Companies.

www.turkishairlines.com



United Airlines

At United we are constantly launching innovative new products to meet the changing business needs of our customers. We listen, act and deliver. With the most extensive portfolio of corporate programs in the industry, and award-winning traveler products, we design and deliver products around the needs of customers at all levels.

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United Corporate Preferred: Experience preferential treatment on the United journey. Corporate customers receive better priority for upgrades, seat assignments, boarding and solutions during travel disruptions.

United Jetstream: Access key information anytime, anywhere with our online portal for corporate and agency customers. No airline offers better self-serve and reporting options.

United mobile app: Stay informed while on the move with our award-winning mobile app. Check in for flights and keep upcoming travel information in one place including reservations, mobile boarding passes, flight status notifications and more.

www.united.com/business



Wyndham Hotels & Resorts

Wyndham Hotels & Resorts, Inc. (NYSE: WH beginning June 1) is the largest hotel franchising Company in the world, with nearly 9,000 hotels across more than 80 countries on six continents. Through its network of approximately 790,000 rooms appealing to the everyday traveler, Wyndham commands a leading presence in both the economy and midscale segments of the lodging industry. The Company operates a portfolio of 20 hotel brands, including Super 8®, Days Inn®, Ramada®, Microtel Inn & Suites®, La Quinta®, Wingate®, AmericInn®, Hawthorn Suites®, The Trademark Collection®, and La Quinta® and Wyndham®. Wyndham Hotels & Resorts is also a leading provider of hotel management services, with more than 400 properties under management. The Company's award-winning Wyndham Rewards® loyalty program offers more than 56 million enrolled members the opportunity to redeem points at thousands of hotels, condominiums and holiday homes globally. For more information, visit www.wyndhamhotels.com, and click on Travel Professionals to take our Travel Agent University training course, Wyndham Wise.

www.wyndhamhotels.com





For the advancement of business travel

Yapta

Yapta's mission is simple. We help businesses reduce travel costs. Our technology is leading edge. We provide real-time price tracking of airfares and hotel rates across the globe via FareIQ and RoomIQ. Our TravelAI advanced analytics delivers insights from more than \$20 billion in tracked travel spend. Our customers are world class. 8,000+ organizations, including 125 of the Fortune 500, have realized over \$200 million in travel savings with Yapta.

www.yapta.com



Zeno by Serko

Serko has been the leading Online Booking Tool (OBT) for corporate travel in Australasia since 2007. Since then we've expanded into expense management and become a publicly listed business (SKO, NZ) employing more than 150 people across four countries, and servicing customers in more than 25 countries around the world. Over 2 million people use Serko products including many of the largest corporate businesses in Australia, New Zealand and Asia, who trust Serko to help them manage their corporate travel and expense programs. Serko's products are designed to be incredibly easy to use for travelers and incredibly empowering for those managing travel and expense programs. Serko's go to market strategy includes partnering with a well-established reseller network that includes some of the world's largest and most respected Travel Management Companies. In 2018, Serko is extending its global footprint with launches in North America and Europe.

www.zeno.travel



BUSINESS TRAVEL INNOVATOR PRESENTERS

Continued on next page

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By reinventing the TMC, we've made business travel easier for travelers, travel managers and their companies.

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FlightGlobal offers leading solutions in data, insights and analytics to power business success. As we evolve our capabilities, we're entering an exciting new era of aviation intelligence. We are continually developing solutions to support our customers' decisions and planning, leveraging our unique combination of expertise, technology and databases.

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- FlightGlobal powered by FlightStats, is the leading provider of flight tracking and status data. We can provide you with a complete story of a flight—from what's expected, to what is happening now, to what happened.

www.flightglobal/brand



Obex Solutions

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www.obexsolutions.com



HRS Global Hotel Solutions

The company's new Rate Filtering service, which combined with its Rate Protector AI-based audit service that checks for correct hotel rates and amenities, can eliminate squatter rates.

www.corporate.hrs.com



BUSINESS TRAVEL INNOVATOR PRESENTERS

RoomIt by CWT

The travel management company's new venture is offering a customized hotel loyalty bonus program it calls Loyalty Booster, designed to boost hotel attachment rates and compliance.

www.roomit.com



Zeno by Serko



Zeno, a Level 3 NDC-certified travel and expense solution that employs AI and a chat bot booking engine.

www.zeno.travel



Shep

Shep is a revolutionary new open booking tool that helps companies of all sizes manage, understand, and guide business travel spend on consumer travel sites like Expedia, AirBnB, Southwest and more. With a low-friction browser extension, Shep guides employees on which air and hotel results are compliant with their travel policy, collects out-of-policy exception reasons, and sends alerts and booking data to travel managers and TMCs, eliminating their open booking blind spot.

Shep eliminates the natural tension that exists between a company's need for control and employees' desire for freedom by allowing traveler autonomy and real-time manager/TMC visibility and reporting.

Shep believes that light-touch travel guidance, paired with ubiquitous, timely information and communication, empowers employees to book the travel that best suits the needs of the traveler, the business, and the TMC.

www.sheptravel.com



Trappit

Trappit, a technology company founded in Spain in 2014, provides savings to corporations by optimizing their airline post-ticketing business travel expenses. Founded by two Spanish entrepreneurs (Daniel de Carvajal and Luis Martin, respectively CEO and COO of Trappit) with the mission of benefiting corporations and consumers from the airline prices variations based on supply and demand.

Today, Trappit is the leader in airline savings in the European market with over 500 corporations and travel agencies using their ARPO® technology solution. These companies have implemented this solution in their Spanish and European companies, and in many cases, in international markets where they have a physical presence. Trappit expanded to the U.S. in early 2018, opening an office in California, using their ARPO® technology that monitors real time flight prices and offers savings optimization to corporations and travel agencies.

www.trappit.com



TravelBank

TravelBank is the leading all-in-one travel and expense platform and uses a proprietary algorithm to predict travel costs and build budgets with real-time pricing. Designed for busy professionals, the app features a curated travel bookings portal with special corporate rates for business travel, a camera-first experience for tracking expenses on the fly, and rewards program that incentivizes employees to choose more cost-effective options.

www.travelbank.com



TripStreak

TripStreak is a B2B travel technology provider whose patent-pending TripScore algorithm helps corporate travel companies increase revenue and customer satisfaction by personalizing the search experience. Our philosophy is that business travelers want trips that align with their preferences, so TripScore aims to delight travelers while boosting policy compliance and managing travel costs.

By allowing travelers to rank preferences for flights, hotels, and rental cars, the TripScore algorithm personalizes the search and booking experience while staying within company policies, such as preferred partners, cost, and flexibility outlined by travel managers. TripScore can be used via an API and is flexible enough to be implemented within a company's own environment. Adding TripScore to travel search tools easily upgrades customer experience for business travel companies, so they can get back to business.

www.tripstreak.com



Troovo



Troovo makes travel and payment transaction processing entirely virtual with Robotic Process Automation (RPA). Now our customer's people can focus on what matters most—providing the best service to their clients. The RPA software that Troovo provides replicates the time-consuming work a person would normally have to do, taking away the laborious task of data entry and grunt work of processing travel and payment transactions. It enables greater productivity and higher profitability for Troovo's customers and helps ensure that our technology pays for itself rather than adding more cost to a company's operations.

Troovo's core customer base are high volume travel operations which see the benefit of using sophisticated yet easy-to-deploy robotic solutions. These include travel agencies, travel management companies, online travel agencies, airlines and also corporate procurement and purchasing. Credit card, payment and peer-to-peer settlement schemes are also great partners and users of Troovo technology to enable the utilisation of next-generation payment solutions. Troovo is a completely cloud-based, SaaS platform.

www.troovo.com



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Urbandoor is a global marketplace for furnished apartments specifically built for professionals. Our mission is to effortlessly connect professionals with their right apartment every time, anywhere. Unlike other furnished apartment marketplaces, there are no private homes or individual hosts on Urbandoor. All apartments and providers are vetted to meet standards professionals expect. Urbandoor currently has more than 250K furnished apartments in 1200+ markets in 40+ countries.

www.urbandoor.com



The Benefits of Integrating Travel & Meetings Management

BY SHIMON AVISH

Many travel managers now find themselves tasked with managing meetings. On its face, this makes complete sense. After all, they are both travel related, many of the suppliers are the same, they both use similar technologies and require similar processes for looking, booking, traveling, paying and expensing.

Many see combining travel and meetings management as the holy grail of the industry. One of the hard benefits is leveraging combined transient and group spend for strategic hotel sourcing. I recently managed a global hotel RFP for a very large life sciences company and was able to significantly reduce rates for both group and transient and improve concessions and terms and conditions. The savings totaled about 10 percent of the overall cost of the combined programs. Another potential hard benefit is using the same supplier's transient and group payment platforms to leverage the overall spend volume for rebates.

Soft benefits include increased program transparency and compliance, reduced redundancies and increased efficiencies. When travel and meetings are managed jointly, benefits accrue as the organization cross-utilizes HR and shares technologies, data and procurement processes.

Take Advantage of the Opportunities

When organizations cross-utilize travel and meetings staff, the travel staff comes to understand the issues facing the meetings staff and is able to recommend process improvements based on its travel expertise—and vice versa. Cross-utilization can also help address workload peaks and valleys that both teams experience, reducing temporary staffing adjustments throughout the year.

Cross-platform familiarization is another benefit. For example, a meeting planner can look into the expense management system and identify instances when a meeting participant submitted an expense for a meal though the meeting itself provided a meal. If this were a large-enough problem for the company, the organization might choose to make a policy about outside meals during meetings. Similarly, meeting planners could look out for hotel rooms booked outside the meeting room block, or travel managers could identify a traveler who appears to be transient but who booked inside a hotel block and is actually a meeting attendee.

Organizations can realize process efficiencies when travel and meetings staff share their challenges and



Shimon Avish is meetings management head & consulting principal of Acquis Consulting

Hard Benefits

- Leveraging combined spend for hotel sourcing
- Leveraging a single supplier's payment platform to combine spend for rebates

Soft Benefits

- Increased transparency & compliance
- Reducing redundancies
- Increasing efficiencies

synergies. For example, cooperation on quarterly hotel chain reviews and RFP processes can lead to more consistent products and services and thus increased traveler/attendee satisfaction.

Additionally, travel and meetings data consolidation not only ensures traveler compliance to preferred suppliers but also provides deeper compliance management. For example, sharing a payment platform helps identify when a meeting attendee books outside the room block and upgrades his or her room.

Duty of care may also improve with joint management. Traveler security improves when event attendee tracking is managed by the same processes used for traveler tracking, allowing meeting participants to be found and aided during emergencies.

Policy collaboration offers another opportunity. While travel and meetings programs should have independent policies because of their relative complexities, development and periodic revisions of those policies should happen jointly and the policies should reference one another.

Beware the Differences

While there are benefits to managing travel and meetings jointly, it is also important to call out the differences in expertise between travel managers and meetings managers. Both are responsible for policy development and management, although a meetings policy focuses much more heavily on regulatory and duty of care compliance.

Travel managers are concerned with online booking and expense management systems, while meetings managers need to know sourcing, budgeting, attendee management and reporting solutions, in addition to any of 20-plus other categories of meetings technologies.

Compliance management in travel programs typically focuses on supplier compliance, but meeting programs focus on regulatory and duty of care compliance because the stakes for regulatory breaches are financial penalties and government oversight and because the theft of an organization's intellectual property at live events is very high.

Key stakeholders also differ in meetings programs, and the stakes are much higher than in travel. A meetings buyer is purchasing for tens, hundreds or thousands of event participants. If something goes wrong in a travel program, it usually impacts one traveler's experience. But if something goes wrong in a meetings program, tens or hundreds of attendees can be negatively impacted, often customers whose buying decisions are influenced by the quality of their experience.

Finally, resistance to change can be significant in meetings programs, as entrenched interests like internal corporate meeting planners and incumbent meeting planning companies resist any change that threatens their livelihoods.

For organizations to be successful in managing meetings, they need to assign those with true meetings management expertise, to help their travel managers build that expertise or to engage supplemental external resources with the deep domain expertise in meetings management to realize the full benefits. ■

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