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# BTN

BUSINESS TRAVEL NEWS

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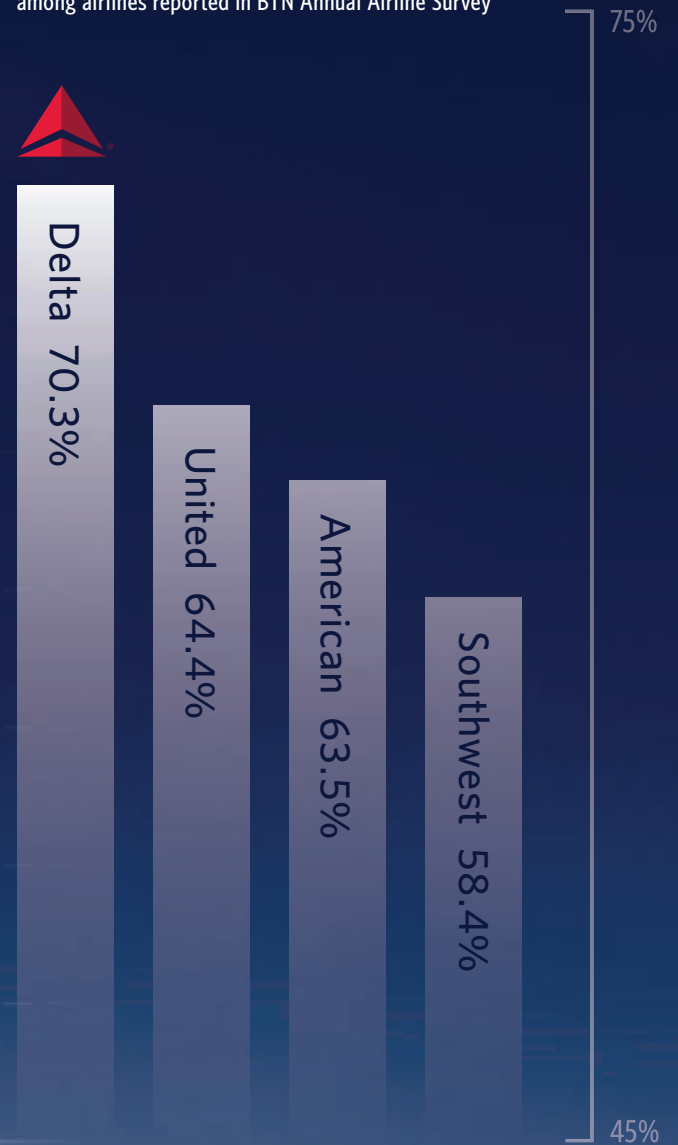
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among airlines reported in BTN Annual Airline Survey



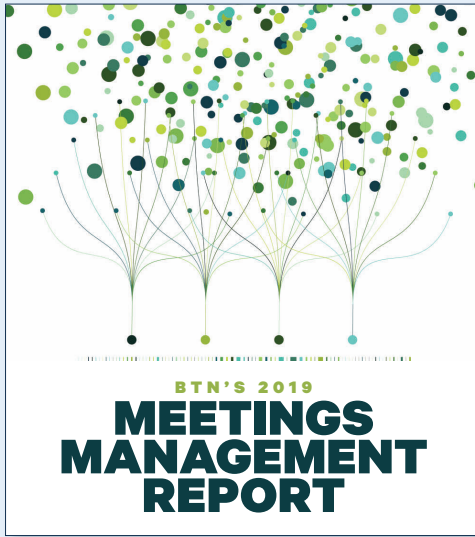
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Based on Jan-Dec 2018 FlightStats Report for on-time arrival (AO) for all flights scheduled & compared to other airlines reported on in 2018 Business Travel News Annual Airline Survey; UA, AA and WN.

# BTN

BUSINESS TRAVEL NEWS



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- What Cvent's Busiest Meeting Hotels Tell Us About Venue Sourcing

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## TOP STORY

### WHAT TRAVEL BUYERS THINK OF THEIR CAR RENTAL COMPANIES

On a scale of 1 (poor) to 5 (excellent)



BY MICHAEL B. BAKER

### BTN'S 2019 CAR RENTAL SURVEY & REPORT

## The Competition Tightens

National still reigns, but Avis and Enterprise switched places and then Budget entered the list in the middle. Travel buyers' overall satisfaction with their car rental suppliers improved in this year's survey, boosted not by the front-runner but by fifth-place Hertz. Satisfaction with the victor, National, dropped from 4.44 on a five-point scale last year to 4.38. Travel buyer satisfaction with Hertz, meanwhile, jumped from 3.83 to 4.05. Avis also upped its score, from 3.9 to 4.29. Last year, Avis didn't break above third place out of four suppliers in any of the survey's 11 categories. This year, it upped its position in most categories and even led in two. Meanwhile, 20 percent of respondents said chauffeured and ridehailing suppliers' service improved since a year earlier.

FULL STORY ON PAGE 16

### ON THE HORIZON

## Big Changes Loom for Payments in Europe

BY AMON COHEN

Card security measures that take effect in the European Economic Area Sept. 14 are set to disrupt corporate travel payments. The introduction of Strong Customer Authentication "will see a greater requirement for people to authenticate when booking travel," said Richard Warren, senior consultant with payments consultancy First-Partner/The Human Chain. "This is most likely to be the case when they are using plastic cards. The process of booking travel through a travel management company or online booking tool may need to change."

Only the U.K.'s financial regulator, the Financial Conduct Authority, is believed to have set out in detail its approach to SCA so far. Yet even the FCA's guidance has left travel and payment companies uncertain of when SCA will and won't be required. Complicating the picture, accord-

ing to BCD Travel VP of commercial payment solutions Mario Kriebel, "only issuers can decide whether they think they need to apply SCA or not." Therefore, travel managers could end up making different changes to their payment processes in different EU countries and for different payment providers in the same country.

All that is clear is that change is coming. Here's BTN's best understanding at this point of what SCA will mean for travel managers.

### Are Corporate Payments Exempted?

Yes. And no. "By default, there is a requirement to authenticate every electronic transaction, but there are some transactions which are out of scope and some which can be exempted,"

CONTINUED ON PAGE 3

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Alaska Airlines' David Oppenheim on senior-level corporate sales & working with travel management companies

"Historically, we were very Pacific Northwest based, and before Delta entered the Seattle market five or six years ago, we didn't need to do those things; we were successful without it."

### ACTE & GBTA Executive Director Hires Are Not Sitting Well with Some

Both the Association of Corporate Travel Executives and the Global Business Travel Association have hired executive directors from their boards, causing uproar over their search processes.

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Scott Solombrino is now executive director and COO of GBTA, and Leigh Bochicchio will become executive director of ACTE on June 17.



# **Hertz**

Change scenery.  
Not standards.

A perfect trip starts with the perfect car.





CONTINUED FROM FRONT PAGE

## Payment Changes in Europe

said Warren. Following fierce lobbying against the European Banking Authority, payment and travel companies gained an exemption for “secure corporate payment processes and protocols” in the final SCA rules, published in 2018. But, as travel manager groups warned at the time, a vague definition of “payers who are not consumers” means no one knows how national regulators will interpret when corporate exemptions do or do not apply.

“Everyone is trying to interpret how SCA should be done,” said Lars Schmidt, AirPlus International senior product manager of payments. “Each issuer is aiming to keep the changes as minimal as possible. It’s our job to be concerned so that the customer isn’t concerned. The idea behind SCA, which is to reduce fraud, is a good one, but the implementation is very demanding when it comes to B2B processes, where fraud levels are low and changes like this hurt more than they help.” Tim Jefferson, also a senior consultant with FirstPartner/The Human Chain, said: “Other [national] regulators have not come out of the gates on corporate payments, but they are taking a much firmer line than the [U.K.’s] FCA on the interpretation of other aspects of SCA.”

### Lodge & Virtual Card Payments

In its most recent guidance, published December 2018, the FCA said “lodged or virtual corporate cards, such as those used within an access-controlled corporate travel management or corporate purchasing system, would potentially be within scope of [the corporate payment] exemption.” But Warren warned: “It’s not clear other regulators will come to the same conclusion. We have not seen any specific indicators at the moment.”

Few of the sources BTN spoke to are confident all regulators will follow the FCA and specify lodge and virtual cards as potentially exempt. At the other extreme, a specification that lodge and virtual cards must use SCA would cause major problems because lodge and virtual card payments are made centrally, making it impractical for a particular individual to provide authentication.

A more likely outcome, however, is that some regulators might not clarify whether lodge and virtual cards are exempted. If that happens, individual issuers may choose to demonstrate to regulators that their particular lodge/virtual products can be exempted because their fraud levels are sufficiently low.

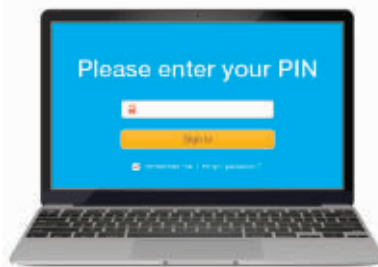
### Plastic Corporate Cards on Consumer Sites

The FCA is clear that plastic corporate cards used for web bookings are not exempt. “In our view, the use of physical corporate cards issued to employees for business expenditure in circumstances where a secure dedicated payment process and protocol is not used (e.g. where online purchases are made via a public website) would not fall within the scope of this exemption,” the authority’s guidance stated.

That should create little inconvenience when corporate travelers both book and pay for themselves. In other cases, change beckons. “It may not be the cardholder who books travel,” said Warren. “It may be an administrator or a travel department. Companies will have to

### What Is Strong Customer Authentication?

**Part of the revised EU Payment Services Directive, it’s designed to combat card fraud. It requires that the payer validate online payments over 30 euros with two of these three forms of authentication:**



Something you know (e.g., PIN)



Something you have (e.g., card/phone)



Something you are (e.g., fingerprint)

prepare for cardholders themselves needing to authenticate. SCA will make it very difficult if the cardholder and the booker are not one and the same person.”

Also affected will be an administrator or manager who uses the same plastic corporate card to book travel for different people. “We see this very often in small companies,” said BCD’s Kriebel. “The cardholder might get 20 authentication requests on their phone per day, not knowing who they are for. Either you will have someone approving without checking, or this practice will have to stop. The potential solution here is a virtual card.”

### Plastic Corporate Cards in “Secure Corporate Environments”

“The area where things are less certain is where a plastic card is held in a secure corporate environment, such as a TMC profile,” said Warren. “The FCA wording doesn’t specifically say it’s OK, but we read that it is within the scope of this exemption. The trouble is: That’s not certain, and there is also a lot of difficulty around how these exempted transactions can be identified versus those which are made on a website and aren’t exempted.”

### Online booking tool or TMC transaction via a GDS:

“We would like all corporate cards used in the TMC environment to be out of scope,” said Adrian Parkes, CEO of U.K. TMC organization GTMC. But the crucial practical test for a “secure corporate environment” appears to be whether the reservation is channeled through a global distribution system. Discussions with payment companies and GDSs have led GTMC to conclude that GDS bookings will escape the need for SCA but that other channels won’t. TMCs are hearing similar. “GDSs are saying that bookings are out of scope anyway because they are [mail order telephone order]. If that’s the case, it takes out a large part of what TMCs do from SCA,” said Kriebel. Working on this assumption, and it remains an assumption, GDSs and the card industry are looking at practical ways for GDS-based reservations to flag messages to the card company that SCA need not apply.

### TMC transaction not via a GDS:

Kriebel, Warren and Parkes agree that SCA will be required when TMCs book via websites on behalf of clients, such as for low-cost carriers, rail journeys or hotels. “It might be better to move that type of content to virtual cards,” said Parkes. “Not only are there no issues [for virtual cards] with SCA, there is also a lower risk of fraud and the management information is good.”

### Will the Travel & Payments Industries Be Ready by Sept. 14?

Probably not. “I’m pretty sure that if the GDSs have to develop something, they will not be ready by 14 September,” said Kriebel. Warren is also doubtful but believes corporate travel may avoid a cliff edge. “It will be very challenging to have everything in place by 14 September, and some aspects of the regulation have only very recently been clarified, while others still await clarification. There has been a lot of lobbying to help regulators understand the complexities because travel and hospitality is one of the most difficult sectors for payments. The hope is that regulators will therefore take a pragmatic view about enforcement. They won’t necessarily take punitive action immediately, but they certainly won’t tolerate companies doing nothing to prepare.”



## Alaska Makes Gains with Corporate & TMC Partners

Alaska Airlines in recent years has made bigger moves to win corporate market share. Part of that strategy was hiring David Oppenheim for the new position of VP of sales. After more than a year in the role, he spoke with BTN transportation editor Michael B. Baker.

### WHAT ARE SOME OF YOUR MAJOR GOALS AND ACCOMPLISHMENTS SINCE JOINING ALASKA?

I worked at United for some time but also was a consultant, so I've had exposure to a lot of different airlines over the years and this is a really special place with a really special management team. We did not have the senior exposure internally for corporate sales. While we had relationships with some TMCs, we hadn't gone as deep as we should have. Historically, we were very Pacific Northwest based, and before Delta entered the Seattle market five or six years ago, we didn't need to do those things; we were successful without it. [To be successful, I need to make us] more competitive where we need to be against legacy carriers and raise awareness of the value [the corporate sales team brings] among our senior executives. Strong corporate and TMC revenue growth [are] exceeding our stretch targets for 2019, [owing to] the team and the business demand environment. My peers at other airlines will also have good news on the corporate sales front; it's a rising tide for sure. We're really excited about our market share and our market share relative to our fair market share.

### HAVE ANY PARTICULAR SEGMENTS BEEN STRONG FOR CORPORATE SALES?

The strongest growth on a percentage basis has been the California markets. We acquired Virgin America and they had a strong sales program, but being small makes it hard. We've tried to leverage that together. A lot of companies, particularly the tech companies, are not just in the Bay Area or Seattle; they are distributed across the West Coast and the country. So we've become much more relevant to them and grown our relationships. The fare environment, particularly in the first quarter of this year, makes the overall dollar results and profit results more challenging, but the fact that we're winning share in the corporate space, which is the highest-yield segment we have, bodes very well for the future.

### HAS SOUTHWEST CHALLENGED THAT IN CALIFORNIA?

There's been some challenges on the shorter [flights] that Southwest is really competitive on, but what we've talked about is the challenges on the core [transcontinentals]: LA and San Francisco to New York, Boston and D.C. Those fares, particularly in the first quarter, which is always a slow demand period, were down more than usual this year. Things are picking up now, and we're putting in place a lot of actions to make sure we go through next winter in a better position.

### WHAT IS YOUR CORPORATE MARKETSHARE STRATEGY?

When I go into a corporate and tell them about what we can offer, it's about the best experience for their



Alaska Airlines' David Oppenheim talks:

- Progress with corporates & travel management companies
- Why Alaska shuns soft-dollar funds for corporates
- Integration with Virgin America

travelers. Other airlines have very big soft-dollar funds to waive fees, handle issues and all of these sorts of things. We have a lower fee structure than the legacy carriers, so we're starting off from a better point. When I first got here and we had our first corporate advisory board, I asked, "We don't give you soft dollars. Shouldn't we be giving them to you?" Unanimously, over 20 people, said, "Absolutely not. You solve my problems. Your normal processes solve my problems. Don't give me some dollar figure I have to keep track of."

### HOW ARE THINGS PROGRESSING WITH THE VIRGIN AMERICA INTEGRATION?

We're 80 to 90 percent done. From a sales perspective, we're 100 percent done; [that was] purely contractual, so it was largely done before I arrived. The real heavy lifting is integrating work groups and processes. On a lot of that, we're done: Our pilots can fly next to each other, and we're starting to see pilots cross-training. The flight attendants are done because their training doesn't take as long. The one place we're a little behind is on the maintenance side. We don't have a joint agreement yet and are working actively to do that; a former Virgin tech cannot touch a former Alaska plane and vice versa.

### WHAT'S HAPPENING ON THE PRODUCT SIDE?

We are redoing the interiors of all the former Virgin America Airbus planes. There are a lot of small elements we did bring in [that] Virgin was successful at, [but] it will feel a little more Alaska than Virgin. The premium cabin is really excellent first class seats. We [will] have one configuration of first class seats as we retrofit the fleet. We know it is not the premier product for transcon flying—particularly from California to New York, we're the only one offering seats in first class instead of beds—but we have other things going for us: the quality of service we provide onboard, a food offering on par with anybody else. Certainly on a red-eye flight we don't have the premier product, but we have great pricing.

The things we've done in coach are bigger. Our premium class, which is our extra-legroom economy section, has the same seat attributes as our economy cabin but complimentary drinks, snacks and things like that. We have power and USB ports at every seat, not for every two seats, and they're right there in front of you. We've added phone and tablet holders. It's configured so no matter what device someone is using five years from now, you can have it in front of your face and plug it in. We've invested in the most movies and TV shows in the sky, all available free. We're putting satellite Wi-Fi on board; the Gogo air-to-ground system, while it's been pretty reliable, is not fast, particularly on heavy business routes. With satellite, everyone can be online. The speed is so fast that you can stream your own stuff. We will have a lot of the fleet done before the end of 2019. ■

## What Oppenheim Says About Alaska's Network

"About three years ago, we launched a whole lot of new routes, and not every one's a winner. We've made a couple of market exits and changes, and you redeploy. We've launched a number of routes over the past year like Pittsburgh, routes between both Seattle and El Paso and San Diego and El Paso that have been successful. The vast majority of the new routes are working out and are maturing nicely, a number of them well ahead of schedule. We need to get our margins to a place where we have the right to grow. If we're not making a reasonable amount of money, we're not going to invest in growth. Our margins have been improving. We historically have grown much faster than the industry, and we think we will return to that pretty soon."

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# ACTE & GBTA Executive Hires Are Not Sitting Well with Some

BY ADAM PERROTTA

The recent appointments of executive leaders by two major corporate travel associations have created an uproar, drawing criticism for selection processes characterized as opaque and potentially skirting the bounds of propriety. They may even have shaken confidence in the groups' statuses as leading advocates for the industry.

Both the Association of Corporate Travel Executives and the Global Business Travel Association recently selected new executive directors. ACTE named then-board president Leigh Bochicchio to the role in May, less than a month after GBTA announced then-Allied Leadership Council president Scott Solombrino would take the helm as executive director and COO.

Both Bochicchio and Solombrino had long served on the boards of their respective organizations, but industry sources critical of the appointments told BTN the issue isn't with the hires coming from the groups' boards. Instead, sources raised questions about the associations' search processes, arguing that neither cast a wide-enough net in identifying and evaluating outside candidates. "Particularly with GBTA," said one past board member of the association, "there was no transparency around the process. If the bylaws allow that, the bylaws need to be changed."

GBTA chairman Bhart Sarin told The Company Dime that while his association did solicit external consulting, GBTA did not contract a firm for a full search process. Sarin argued that doing so was not an appropriate use of membership funds and that Solombrino's experience, which includes 30-plus years as president and CEO of Dav El/Boston Coach and co-founding the National Limousine Association, clearly made him the best candidate for the role.

Solombrino's experience notwithstanding, hiring executive leaders from within is a dicey proposition for professional associations, according to David Patt, head of Association Executive Management, an organizational consultancy. "Hiring from within happens a lot, and there is mixed opinion



Scott Solombrino is now executive director and COO of GBTA, and Leigh Bochicchio will become executive director of ACTE on June 17.

about whether or not it is a good idea. Those who support it claim an inside hire will be more knowledgeable about the industry and the organization and will have a shorter learning curve. Those who are critical say the hire shares all the biases of the industry and the organization and has established relationships with players and staff that may get in the way of objectivity." Patt counts himself "among the critics" of hiring internally for professional association leadership positions.

Solombrino's hiring raised eyebrows in terms of his outsize influence at GBTA, but ACTE's selection of Bochicchio appears to include its own wrinkle. According to sources with knowledge of the matter, Bochicchio sat on the hiring committee for a significant portion of the search and interview process before eventually being named to fill the role herself. Once named, her board president seat went to Lori O'Connell. O'Connell also served on the hiring committee and directly benefited from Bochicchio's selection, according to sources.

ACTE insisted the hiring process was conducted properly. "We solicited and evaluated a number of applications from both inside and outside the organization in accordance with ACTE's bylaws surrounding executive appointments," a spokesperson said. "We leveraged the expertise of a nonprofit recruiting firm to assist in the initial screening of all the candidates and to present a pool of the most qualified candidates, internal and external, to the search committee."

But critics said that even assuming the process was completely on the up-and-up, the mere appearance of a potential conflict of interest should have warranted more transparency. "When you're an association, you have a responsibility to your members to be very cognizant of the optics of the process," said a longtime industry veteran with knowledge of the matter and who took issue with the "eleventh-hour" nature of Bochicchio's appointment: "You're supposed to represent your membership, and in doing so, you should have the highest standards out there."

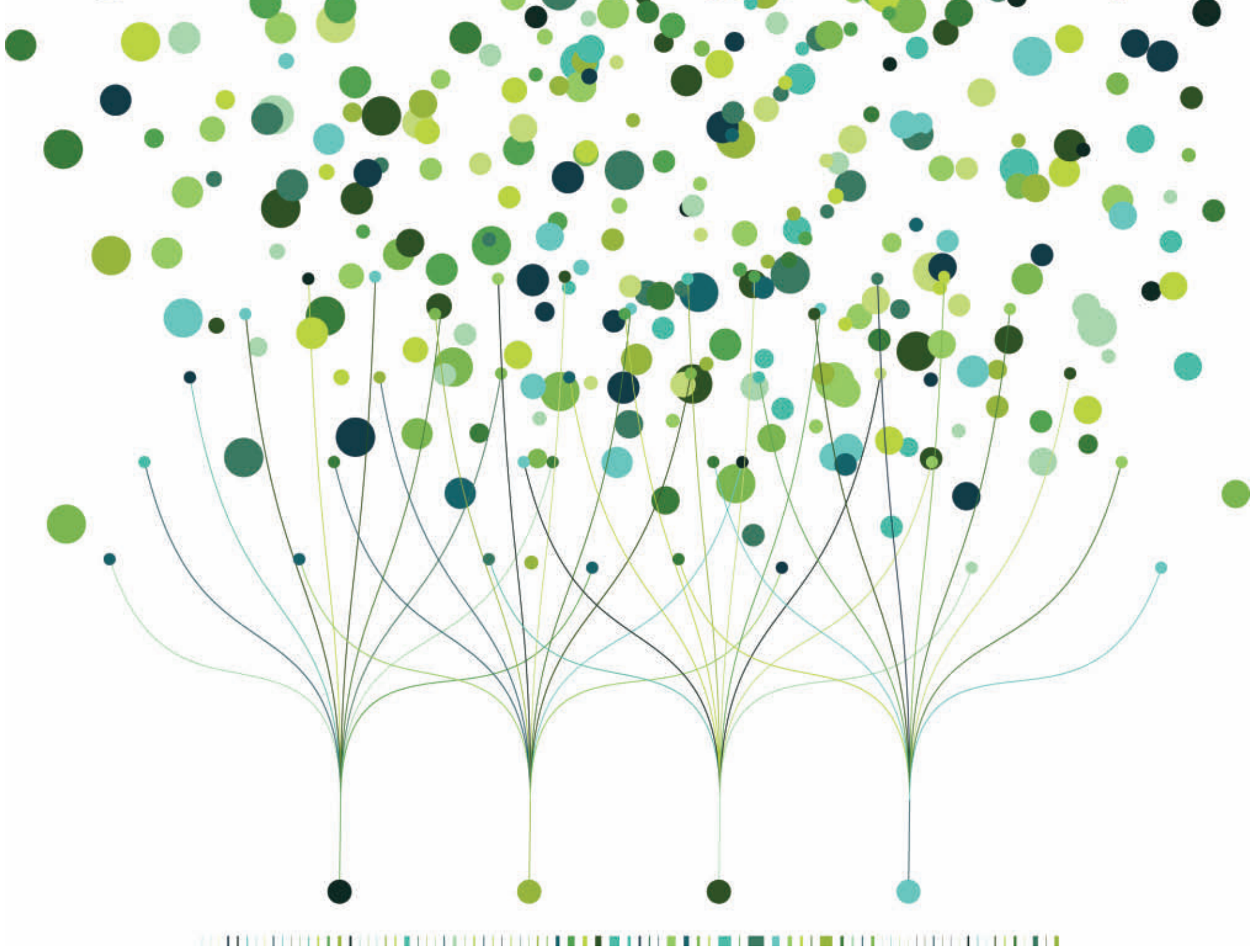
The source expressed particular disappointment over ACTE's decision to follow GBTA's lead in plucking its executive leader from within its own ranks, rather than taking the opportunity to make a powerful statement by hiring an outside candidate. Another industry veteran agreed: "It just doesn't look good from an industry leadership perspective. The process was suspect from beginning."

Acrimony over the ACTE and GBTA appointments has spread among industry stakeholders, according to a source who said the issue crops up "at the start of every conversation I have with any travel industry colleague. Every place I go, it's all we talk about."

**"It just doesn't look good from an industry leadership perspective. The process was suspect from the beginning."**

— AN INDUSTRY VETERAN DISCUSSING ACTE'S DECISION TO HIRE AN EXECUTIVE DIRECTOR FROM WITHIN

The issue could affect attendance at industry events, including the GBTA Convention 2019 in Chicago in early August, multiple sources suggested. One noted a push to boycott the convention itself, instead traveling to Chicago only to meet with suppliers and customers off-site. Another source said, "We're all saying we have to vote with our attendance at events." ■



BTN'S 2019

# MEETINGS MANAGEMENT REPORT

Return on Attendee Experience • Data Management • Venue Sourcing Trends

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Thank you for your continued support of Delta and enjoy this special report.

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Senior Vice President – Global Sales  
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We have also launched **Serve 360: Doing Good in Every Direction**, a robust sustainability and social impact platform to do our part in taking on our world's most pressing social, environmental and economic issues. We are focused on finding ways to incorporate interesting and helpful ideas from this platform to events held at Marriott hotels.

Marriott International is proud to sponsor this BTN Meetings Management Report, which I hope you find to be helpful when planning your next meeting or event.

Warmly,

Tammy Routh  
Senior Vice President, Global Sales  
Marriott International

# Finding the Return on Experience in Meetings Management

BY DAWIT HABTEMARIAM

**M**ore meetings stakeholders are trying to leverage business intelligence for meetings management. They want to measure engagement and articulate insights about how effective their meetings are at achieving their companies' objectives. More often today than yesterday, they are asking, what is the return on the attendee experience?

Stakeholders want to go beyond static reporting, beyond snapshots on savings and compliance. They want to drill down into an audience's engagement and what that ultimately delivers to the host organization. "They don't care as much about how the cost of this particular meal compares to the last time they did this or compared to a different division in their organization," said Acquis Consulting Group principal and meetings management head Shimon Avish. "They really care about whether the customers were happy at this event, whether they were engaged or whether they're able to convert them, if it's an external clientele, into a sale or generate additional loyalty."

Kimberly Meyer, principal of consultancy Meetings Strategy, said, "From a business intelligence perspective, there is gold in terms of who attends these meetings, what comes out of these meetings and what happens next in terms of their relationship with [the host] company." Engagement data insights can tell meetings managers when to scrap an event that isn't working or tweak it to hit a corporate target.

### Increased Focus on Intelligence

In the early days of meetings management, "we really focused on savings and compliance to the exclusion of quality events," said Avish, who promoted meetings management strategies as early as 2004. Event-quality metrics should have been front and center for a major stakeholder, the chief marketing officer, he said, but it often didn't happen. As a result, marketing departments have been strong holdouts from managing meetings. They looked at the metrics involved—cost-cutting, year-over-year savings, cost-per-attendee—and didn't see their interests represented. What about increased sales conversions and loyalty? What did attendees actually learn at the event? How has the event changed the way attendees think of the company's brand?

### What Data Can Do

Common questions companies want to answer with data, according to Glisser founder Michael Piddock

- **Sales generation:** Did you sell more things as a result of that event? Did the attendees that were more engaged at the event go on to buy more from that company?
- **Raising brand awareness:** Was the brand effective in building brand perception? "You can start to look at analytics around social media and around Instagram posts related to your brand, around activation and [if they] actually shared it on social media with followers."
- **Learning:** Did attendees learn what we were trying to teach them? You can determine this by "scoring them, testing them, checking their knowledge."
- **Networking:** Did people connect at the event? "How many LinkedIn connections were made from people in that room? Did people make connections that led to new business?"

These days, meetings managers are recognizing the critical nature of metrics that will support marketing and business-building goals. And, said Avish, they are looking to buy or build the tools that can capture them.

### What's Your Objective?

Michael Piddock, founder of Glisser, an audience engagement analytics provider, said a lot of clients come to him to enhance audience engagement. "Our clients may run a whole host of events and spend a lot of money on them," Piddock said, "but they may not know whether their meetings are achieving their objectives or if their audiences are satisfied." Other clients may understand the bigger picture, but they want to get more granular. "Maybe they want to know which sessions are working and where they can improve their events. Either way, all of them are looking for solutions that use data to help guide their decisions." (See *What Data Can Do*, at left.)

One company answering these kinds of questions with data is McDonald's. Every other year, the fast food giant convenes 50,000 employees, franchisee owners and vendors from around the world. Bringing all these groups together makes fundamental sense, but the outcome had never been measured well. What worked and what didn't? What experiences did the attendees find useful? What content resonated with them?

Convention decisions were made more or less by tradition, according to McDonald's global meetings manager Erin Smock, speaking last month at BTN Group's Strategic Meetings Summit. "We had a lot of 'We always do this,' ... 'We have to have that,' but [we didn't have] a real ability to say why," she said.

That all changed in 2018. The convention that year was held in Orlando, and McDonald's dug deep into attendee interactions to understand individual, as well as overall, engagement. The company used event registration data to build attendee personas and used unique ID numbers to track attendee activity across the event's digital platforms like the website and onsite apps. It also collected activity patterns on the ground using Bluetooth Low Energy attendee badges. With the help of consulting partner ZS, Smock and her team uncovered lessons about the event. "[We were able to see] how people were consuming the event, how messages were resonating, how we were shifting sentiment, as well as logistics around when people are coming and going."

First, McDonald's gained clarity on the event's audience. Conventional wisdom taught that attendees were a mix of suppliers, employees and franchisees. "Now [we know] the attendee is really the franchisee. That was a good lesson for us," said Smock. Second, the data revealed aspects of the event that could be improved. Traditionally, McDonald's had prescribed attendee schedules to a degree during the event, but the data showed that "they didn't love that," Smock said. The data also identified some highly produced content that did not draw big attendance. Third, the data taught some important logistical lessons: Following an industry trend, McDonald's attendees are moving away from structured meal times and prefer to have snacks throughout the day. As a result, the convention's five-course event dinner and its associated costs are now on the chopping block. McDonald's data efforts also validated the perception that event attendance thinned by 4 p.m. each day. Smock is working on fitting event content into fewer hours and is going into the 2020 program feeling a lot more prepared. "We have all this really great information to [help us] plan," she said.

### The Next Level

Year-over-year data analysis and decision-making is a critical milestone for meetings management. As data practices advance, however, goals remain, Avish said. Industry benchmarking is a real frustration for meetings stakeholders who want to dig deeper into program performance. "We can't yet compare ourselves to peers, competitors and like-size companies, which is a real shame. We do that on the travel side of the industry and we get rich data and rich insights." ■

## Best Practices for Strategic Meetings Data Protection & Management

BY DONNA M. AIROLDI

It's been just over a year since the European Union's General Data Protection Regulation took effect, governing how personal data is handled both inside and outside the European Economic Area for citizens of the region's countries—EU members plus Iceland, Lichtenstein and Norway. If you're a meetings manager collecting data on these citizens, your company needs to comply with this law. If found in breach, the company could be fined 20 million euros or as much as 4 percent of annual revenue, whichever is greater.

Are companies ready and complying? The answer is hard to pinpoint. Those in fairly regulated industries like financial services and pharmaceuticals had some compliant processes in place already and began to adopt more when the law was approved in 2016. Others that scrambled to create data privacy policies before the May 25, 2018, deadline initially focused on internal systems but are now doing more serious third-party vendor evaluations and employee training. What does seem to be consistent is that meeting managers in general are afraid they're not doing enough.

"People are concerned that if an audit hits, even though they've been working to try to get it right ... it's still such a huge job that they won't have done enough, and they feel it's their responsibility," said Kimberly Meyer, principal of consulting company Meetings Strategy. She moderated a panel on protecting and managing meetings data at a BTN Group Strategic Meetings Summit last month. "Most corporations would say [the responsibility] is shared, but some people feel that they'll be pointed at because they own meetings."

The right course of action is hard to nail down, but here are some best practices for meeting managers.

### Have a Data Strategy & Know Your Important Partners

Check with the company's data privacy officer, if there is one; the compliance department; the technology department; and legal. Find out what data privacy policies already exist in the organization. Work together to make sure the policy includes the meetings department, is

clear with rules around who owns what, and is flexible enough to evolve with changing business needs and operations while remaining compliant.

American Express Meetings & Events formed a data task force in early 2018 with members from American Express Global Business Travel's meetings information team, operations and technology, as well as business analysts, to meet on a weekly basis, said Amex M&E director of operations Tina McLaughlin. The team reviews all instances of technology and looks at what attendee data the company is collecting, how it's using it, how to drive standardization while still allowing for customization, and varying needs for different countries and different clients. It also provides governance on any changes coming through.

### Respect the Data Owner & Be Transparent

Adopt honest, friendly, consent-based communication and marketing. Make it a two-way conversation through the use of consent fields or questions, said Cvent implementation team manager Tom Patten.

### Know What You Need & What You Don't

Collect only the data that is actually needed, and once the meeting or event is over, delete what no longer needs to be stored. There is no reason to hold on to attendee dietary restrictions or T-shirt sizes, for example.

### Make Sure the Data Is Secure

Use encrypted fields for sensitive data like ID numbers, credit card information, date of birth and even dietary restrictions. Establish security and privacy service level agreements with anyone who has access to the data,

**"People are concerned that if an audit hits, even though they've been working to try to get it right [data privacy] is still such a huge job that they won't have done enough, and they feel it's their responsibility."**

—MEETINGS STRATEGY'S KIMBERLEY MEYER

including internal staff and third parties. But it shouldn't be the meetings manager's job to know what should be encrypted or to know what is required in different countries, Meyer said. "Legal, IT and compliance should be determining what is needed in a country or region or what should be encrypted," she said.

### Use GDPR as Your Guide

GDPR is just one of several new data privacy regulations around the globe. It is the most comprehensive, so it behooves companies to use it as their guide for setting up policies and procedures for handling personal data. However, "there may be other privacy, employment-related privacy laws or communications laws depending on the company's geographic location or specific sector, and meeting managers should consult their legal teams to find out which privacy laws are applicable," said Samantha Simms, an attorney and founder of The Information Collective, a data privacy consulting company based in the U.K.

Under GDPR, a privacy statement indicates what data is being collected,

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# BTN'S 2019 MEETINGS MANAGEMENT REPORT

how it is being used, how long it is being retained and how it is being shared. A person opts in and has the option to opt out later and request the data be deleted, except when the data is collected on the basis of legitimate interest, said Lenos Software CEO Debra Chong. An example of legitimate interest would be certain information required to register for a meeting. GDPR says technology needs to adhere to Privacy by Design principles, which means that all settings should default to privacy-respecting settings, Chong added. The California Consumer Privacy Act goes into effect Jan. 1, 2020, but experts agreed that GDPR will be more extensive, as CCPA asks people to opt out from the start while GDPR requires opt in.

## Determine Who Owns the Task of Getting Data Privacy Right

Different people have different views on who the point person should be, and it might depend on the type and size of the company. Chong believes it should be the company's privacy council, security and IT. Cvent's Patten said it also could be someone from the meetings staff, provided they are in communication with IT, legal and compliance. Simms believes it rests with the entire organization and that three layers should manage privacy risk:

- the frontline data owners who manage the internal privacy controls required to manage personal data on a day-to-day basis (travel and meeting managers, as well as marketing and finance staff)
- an internal monitoring layer that often sets and oversees the controls; tests the effectiveness of the controls, policies and guidance; and makes adjustments where necessary (privacy, legal, security and IT teams)
- an auditing layer, which can be internal or external and range from a self-assessment checklist to an in-depth investigatory audit.

Most experts agreed ownership should not rest on the meetings manager's shoulders alone.

## License All Technology Directly

This area can get tricky. Some companies claim they cannot afford to have their own licenses for all the technology they use and that they are covered under their partner agencies. But Chong argues that if a company can afford to hire an outside meeting planning and management company, it can afford to license its own technology. Otherwise, she said, "you have no privities. You

don't have any rights unless you go direct." Meyer agreed, explaining that if a third-party has a data breach, the customer whose data was compromised won't care and will go after the company holding the meeting.

## Vet Third-Party Suppliers

Questions to ask: What information do you collect from members and attendees? How will you use the information? Will you sell, give or transfer the information to others? How will you protect the data? How does someone opt out from third parties using their information?

If the answers show the company is not GDPR compliant, revise the licensing agreements. BCD Meetings & Events VP of operations Jenny Lust said her company outlines contractually that each party is protected. Yet, Simms noted that having a license directly from a company does not automatically mean the corporate is the data controller. The data controller is the party who decides how and why personal data is used.

Another step is to use only third-party suppliers that are members of Privacy Shield, Chong said. Privacy Shield is a framework for companies to comply with data protection requirements when transferring personal data from the EU and Switzerland to the U.S. U.S.-based companies self-certify for Privacy Shield via the Department of Commerce and commit to complying with the framework's requirements.

## Document the Flow & Control of Data

Perform a data inventory or a register of how data is being used. Lay out the who, how, what, why and where data is being collected, used, stored and deleted. This will enable the program manager to understand who has the data and what they're doing with it and to make the necessary checks against it. It could be as simple as an Excel spreadsheet. This is one of the most important features of a privacy program, Simms said.

## Complete a Data Protection Impact Assessment

This is a checklist to identify and mediate the privacy risks associated with a tool, process, system or service, Simms said, adding that GDPR requires companies to complete a Data Protection Impact Assessment where there is a large-scale use of sensitive personal data, automated decision-making/profiling or systematic monitoring. A meetings management system that collects large amounts of data is likely to be subject to a DPIA.

## Communicate the Data Privacy Policy

Make sure employees are familiar with your privacy strategy—the policies, service level agreements and legal requirements that are in place. Particularly in companies with decentralized meetings programs, this will help reduce the risk of mishandled data, such as unencrypted attendee data emailed to a hotel or meeting venue. Make sure employees know they could be putting the company at risk if they don't adhere to the data policies and procedures.

## Perform Audits

An audit could be as simple as running internal validation checks on the data being collected and reported on to make sure it's accurate and that there are no breaches in compliance. Accounting and consulting firms also can perform more extensive external audits. "They can find all the holes before a government body or tax authority comes in to audit you," Meyer said.

A company should also audit third-party partners to make sure they're handling data as required. "It could purely be a risk assessment and may not be as in depth as an audit, but it gives a good benchmark for what the suppliers you are using are doing themselves," BCD's Lust said. "We do that, too, for anyone we are partners with."

The audit should be performed by someone not in the reporting matrix of the department being audited and not the person directly responsible for the supplier's day-to-day operations/relationship with the company, Chong said. Internal audits should be conducted every six months or annually, Meyer said. Third-party vendor checks should be performed every year or two, depending on how much a company uses that supplier for data handling. ■



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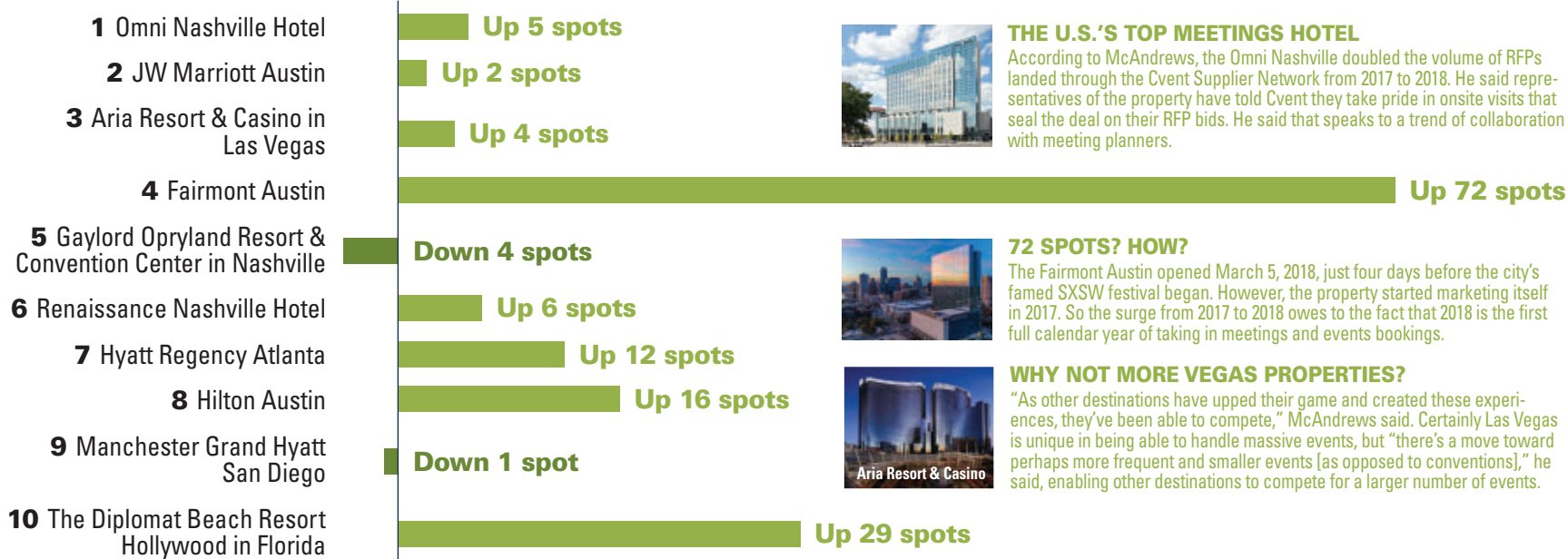


# BTN'S 2019 MEETINGS MANAGEMENT REPORT

## What Cvent's Busiest Meeting Hotels Tell Us About Venue Sourcing BY AMANDA METCALF

Meetings organizers sourced \$15 billion worth of business through the Cvent Supplier Network in 2018. Here are the hotels that brought in the most meetings and events booking and RFP activity. Cvent Hospitality Cloud Marketing VP Chris McAndrews also helped us read between the lines.

### TOP 10 U.S.

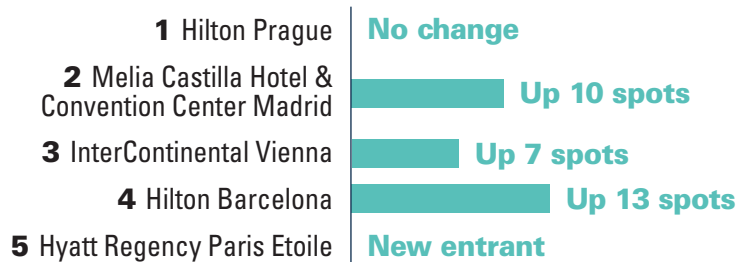


### NASHVILLE & AUSTIN EACH HOST THREE HOTELS IN THE U.S.'S TOP 10. WHAT'S SO SPECIAL ABOUT THESE HOT SPOTS?

"If you visited Nashville lately, you see the sky is littered with cranes and construction, and it's just an incredible growth story in general," McAndrews said. Over the past several years, it's shifted from a leisure destination to one that attracts corporate and association events, so "it's blended leisure with business. Event professionals are looking for that ... because one of the things we find at Cvent that

has become very desirable if not a necessity is to create a sense of an experience around an event." He added: "Five years ago, Austin was not on the list at all." Like Nashville, the destination boasts growth and offers a sense of experience. Music, food and technology—"all of these things play into Austin as a strong corporate destination," he said, not to mention Google's plan to open offices there.

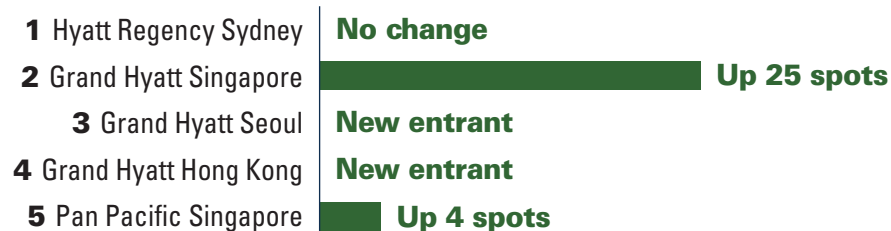
### TOP 5 EUROPE



### NO BREXIT IMPACT YET

Based on the data that informed this Cvent list, as well as Cvent surveys of travel buyers, Brexit has not had a significant impact on U.K. meeting venue sourcing by planners outside the U.K. According to McAndrews, "People are continuing to seek out what they feel is the best destination for their meeting, regardless of what may be hanging over the future."

### TOP 5 ASIA/PACIFIC



### GRAND HYATT: THREE IN ASIA/PAC'S TOP FIVE

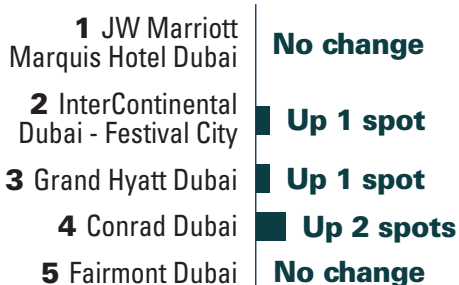
Much of the sourcing through Cvent for Tier 1 cities in Asia/Pac comes from the U.S., said McAndrews, where familiar names appeal to meeting planners' duty of care. Additionally, Grand Hyatt's Go Grand marketing plays into meeting planners' goal to provide an experience, the same goal helping move Austin and Nashville up the U.S. list.

### TOP 5 CARIBBEAN & LATIN AMERICA

New list this year

- 1 Grand Hyatt Baha Mar in Nassau, Bahamas
- 2 JW Marriott Guanacaste Resort & Spa in Costa Rica
- 3 Four Seasons Resort Costa Rica at Peninsula Papagayo
- 4 Paradisus Palma Real Golf & Spa Resort in the Dominican Republic
- 5 Hyatt Ziva & Zilara Rose Hall, Jamaica

### TOP 5 MIDDLE EAST & AFRICA



### DUBAI, DUBAI, DUBAI, DUBAI, DUBAI

Sourcing activity for the Middle East and Africa through Cvent is growing, McAndrews said. Dubai dominates, but Cvent is seeing more activity in cities like Cairo and Marrakesh, Morocco. As digital marketing of venues increases and as meeting planners get more comfortable with the region via Dubai events, he wouldn't be surprised to see other locales in the region make headway on Cvent's list over the years.

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## Car Rental Competition Intensifies

National earned its fifth straight victory atop BTN's annual Car Rental Survey, though it faced stiffer competition than in past years, as travel buyers' overall satisfaction with their car rental suppliers improved.

Despite a slight decline in total score year over year, National's average score across 11 criteria beat its competitors, as it has every year since BTN launched the survey. Both Avis and Hertz, however, significantly improved their scores, and Avis outscored National in two categories: travel buyers' relationships with the sales team and mobile app functionality. Avis' improvement also boosted it to second place, ahead of National sister brand Enterprise, which had held the second-place position every prior year. Avis sister brand Budget also garnered enough use among corporate buyer respondents to be included in the survey for the first time, and it debuted in third place, ahead of Enterprise and Hertz.

This year's survey marked the first time all the car rental suppliers' overall scores topped four, on a five-point scale. A third of buyers saw improvement in their car rental suppliers compared with the previous year. More than 60 percent said their suppliers' service levels had remained the same, and only 5.2 percent said it got worse. Abrams Consulting Group president Neil Abrams said the suppliers are all in investment mode as competition heats up. "You can see that it's so close between top and bottom," he said of the survey. "Their feet are to the fire right now and not just by the customers but by the marketplace."

National has the advantage of being a private company, which means it can invest without the scrutiny of analysts on quarterly earnings calls. "It's a long-term, growing business, and we do not necessarily have to do things in a quick way," Enterprise Holdings SVP of business rental sales and international tour Don Moore said. "We can take time, investing and growing in certain areas." Moore said that on internal surveys, service rankings for National have "never been higher." In BTN's survey, National outscored competitors in most criteria. Its strongest areas were clean, well-serviced cars; perks, amenities and upgrades for VIP travelers; and efficient transportation to pickup/dropoff and efficient lines. For the latter, Moore credited National's speedy Emerald Aisle rental offering. He said changes in the coming year will make things "easier and better for the customers."

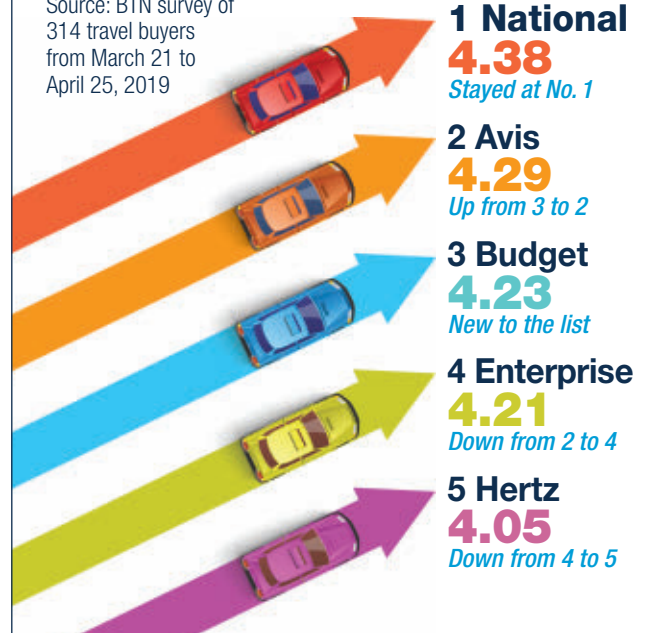
Avis, meanwhile, improved its score in every criterion in BTN's survey. Avis Budget Group SVP of sales Beth Kinerk said that stems from "making sure customer experience is paramount." In particular, Avis has aggressively invested in technology, Abrams said, as evidenced by its score on BTN's survey for its mobile app. "Certainly, more than all the companies, Avis has spent time looking at this next generation of connected vehicles, recognizing that this business and industry is changing at an accelerating rate," he said. "Any company that is not spending on technology and evolving from legacy rental will be left in the dust." Kinerk said Avis is on track to have a fully connected fleet by 2020, meaning the vehicles will be able to communicate with the mobile app, and the company has been tweaking its app, based on feedback from customers and travel buyers, to provide insurance information, track shuttle bus arrivals at airports and other capabilities.

Budget not only broke through the usage threshold on the survey this year but also outscored its competitors in the category of communicating with travel buyers about changes. That brand, too, has seen growing use from the corporate space, Kinerk said. "It was always considered more of the leisure brand, but as we get into bleisure, extending work trips into leisure trips, we're seeing

### WHAT TRAVEL BUYERS THINK OF THEIR CAR RENTAL COMPANIES

On a scale of 1 (poor) to 5 (excellent)

Source: BTN survey of 314 travel buyers from March 21 to April 25, 2019



the Budget brand growing. [Business travelers] like to have the choice of the two brands on the booking tool."

Scores for Hertz, which declined to be interviewed for this story, also rose across all criteria. The company has achieved something of a turnaround after several years of financial challenges and has been investing in technology and fleet as a part of that rebound. "They're an excellent company with good brands and a good operating team; they've just been playing catchup for so many years," Abrams said. "They're back in the hunt—not back as the leader yet, but they have made strides."

As in previous years, communication with travel buyers emerged as the dominant theme among travel buyers commenting further on BTN's survey. That applies both to what their car rental partners are doing well and to what they can do better. Several buyers credited their suppliers with improving in-person quarterly business reviews.

National and Enterprise have maintained a focus

### HOW CAR RENTAL COMPANIES RANKED IN ...

On a scale of 1 (poor) to 5 (excellent)

	Negotiating pricing & amenities	Travel buyer relationships with account managers & sales reps	Communication with buyers about changes	Quality of data & reporting	Cost transparency during booking & payment	Mobile app interface & capabilities	Efficient transportation to pickup/dropoff & efficient lines	Clean, well-serviced cars	Perks, amenities & upgrades for VIPs	Resolution of travel buyer & traveler complaints	Overall value of services for cost
<b>National</b>	<b>4.39</b>	<b>4.29</b>	<b>4.14</b>	<b>4.34</b>	<b>4.35</b>	<b>4.3</b>	<b>4.41</b>	<b>4.65</b>	<b>4.57</b>	<b>4.4</b>	<b>4.37</b>
<b>Avis</b>	<b>4.35</b>	<b>4.32</b>	<b>4.18</b>	<b>4.24</b>	<b>4.16</b>	<b>4.35</b>	<b>4.28</b>	<b>4.43</b>	<b>4.39</b>	<b>4.28</b>	<b>4.24</b>
<b>Budget</b>	<b>4.31</b>	<b>4.29</b>	<b>4.2</b>	<b>4.28</b>	<b>4.22</b>	<b>4.09</b>	<b>4.26</b>	<b>4.3</b>	<b>4.18</b>	<b>4.23</b>	<b>4.21</b>
<b>Enterprise</b>	<b>4.24</b>	<b>4.18</b>	<b>4.07</b>	<b>4.22</b>	<b>4.21</b>	<b>4.06</b>	<b>4.34</b>	<b>4.34</b>	<b>4.11</b>	<b>4.3</b>	<b>4.21</b>
<b>Hertz</b>	<b>4.02</b>	<b>3.81</b>	<b>3.84</b>	<b>3.96</b>	<b>3.99</b>	<b>4.13</b>	<b>4.2</b>	<b>4.38</b>	<b>4.21</b>	<b>4.03</b>	<b>3.93</b>

Source: BTN survey of 314 travel buyers from March 21 to April 25, 2019

## By Michael B. Baker

on constant communication with travel buyers, Moore said. “We have more than 700 salespeople out in the field, strategic sales managers and account managers, having continuous conversations with those folks. We understand what their needs are and are constantly looking to get better.”

Many buyers complained about transparency, especially in terms of surprise upsells to travelers at the counter. Avis tackled the transparency issue with the launch of its Business Intelligence portal this year, providing rental summary dashboards and other insights for corporate travel buyers. “We’ve had reporting, but we’ve built on that, based on feedback from customers, and are giving them direct access to more data than ever before,” Kinerk said. “Open rentals, environmental sustainability, mobile app utilization—they can see it on the dashboard and can customize reporting and” key performance indicators.

Even as buyer satisfaction improves, the car rental industry is undergoing a larger-scale transformation. Competitive pressures from outside the industry are increasing, not only from ridehailing apps, whose use cases can replace car rental for some business travel needs, but also from auto manufacturers like Ford and Audi entering the car-sharing space, Abrams said. In the meantime, car rental companies are evolving; for example, some provide vehicles for ridehailing drivers, and they increasingly are investing outside their core rental products. Enterprise, for example, completed its acquisition of corporate travel technology platform Deem this year, and it has partnered to launch a car-and-driver service in China. That service could expand to other geographies. “We like to joke that we no longer call ourselves a car rental company; we’re a travel solution,” Moore said. Avis, meanwhile, has partnered with Google’s autonomous vehicle spin-off Waymo so that when the technology becomes more prevalent, “we’ll be ready for it,” Kinerk said.

Such an evolution will be crucial to all the players’ long-term survival, Abrams said. “I hate to use this metaphor, but it’s a Game of Thrones, and who is really going to be sitting in the [iron] throne a year from now or five years from now?” Abrams said. “It’s not just car rental companies but mobility companies, so those companies should all be really challenging themselves.” ■

## Car-Ride Suppliers Improve in Buyers’ Eye

Travel buyers report that service levels from their chauffeured and ridehailing suppliers improved year over year. Scores rose across every car-ride category in BTN’s Ground Transportation Survey. The survey encompasses both kinds of suppliers, though under one-fifth of respondents have enrolled in ridehailing suppliers’ corporate travel programs, such as Uber for Business.

The order of categories as ranked by buyer satisfaction went largely unchanged this year from last year’s survey. Suppliers once again scored best on the quality of their vehicles, driver screening and duty of care and the quality of drivers who are direct employees. The bottom three categories once again were quality of data and reporting, service consistency across affiliates and negotiating pricing and amenities. Many travel buyers said their providers needed to improve in the consistency category. “Affiliates need to be held to the same standards globally,” one buyer wrote of chauffeured services. “A car should never be late for a pickup.”

Nearly three-quarters of travel buyers said service levels have been consistent compared with the previous year. Additionally, nearly 20 percent said service had gotten better, while only 6.4 percent said it had gotten worse.

The line between traditional chauffeured suppliers and ridehailing apps continues to blur as both try to improve on what the other does better, Blacklane CEO and co-founder Jens Wohltorf said. New “technology platforms brought in a lot of technical innovation in how you hail and book a car and invoicing—the end-to-end technical journey. And on the physical experience, the legacy industry has been good in delivery of the final ride,” he said. “The industry has been woken up by the disruptors, and they are trying to leverage on their strength.”

Chauffeured suppliers have continued to upgrade their technology; EmpireCLS, for example, announced in August the development of a new app with simplified booking capabilities, vehicle tracking and driver information, though the app is not meant to provide on-demand bookings. A few years ago, Carey International launched its Embarque 10&2 platform, which provides a ride within 10 minutes along with GPS tracking and driver and vehicle information. It now operates in Boston and San Francisco.

About three-quarters of travel buyers said they are at least aware of on- or near-demand services offered by traditional suppliers, though only about 18 percent said they use such services. Taxis are getting into the game, too, thanks to apps like Arro, which enables riders to book taxis in ridehailing style. And Xoo-ox, which launched in the U.K. in recent weeks, searches for local cabs and lets drivers set their own prices.

The ridehailing apps, meanwhile, have firmly settled into corporate travel. Uber still leads as the most-expensed ridehailing brand for North American businesses in Certify’s analysis of its expense reports. On Lyft’s first earnings call, in May, president and co-founder John Zimmer said revenue from its corporate partners is growing faster than its overall business. Fewer than 20 percent of travel buyers in BTN’s survey have enrolled their companies in one of the ridehailing suppliers’ corporate business programs. About half of travel buyers allow the apps but do not address them in policy, and a quarter said they encourage their travelers to use them in certain circumstances. Only 6.1 percent prohibit use of the services in their travel policies.

Uber and Lyft, however, find themselves under tighter financial scrutiny now that both have gone through IPOs and are operating at heavy losses. Lyft CFO Brian Roberts on the company’s earnings call said this will be a peak loss year as Lyft moves toward profitability. Both companies are investing in areas outside ridehailing, such as autonomous vehicles, bike-sharing and food delivery. ■

### METHODOLOGY BTN’s Car Rental Survey

From March 21 through April 25, 2019, BTN surveyed travel manager and travel buyer members of the BTN Research Council and a randomly selected subset of qualified subscribers of BTN and Travel Procurement. Equation Research hosted the survey and tabulated the results, and totals were based on 314 respondents. Those respondents graded only those car rental companies with which they had negotiated contracts or booked meaningful amounts of business in the past year. Brands that did not reach a minimum usage threshold were disqualified from the survey. BTN averaged the category scores to create an overall score for each car rental company. Responses from participants who did not respond to questions for a particular category or brand were not included in that category or brand’s average. Categories were consistent with those measured in the 2018 survey.

### BTN’s Chauffeured & Ridehailing Survey

From March 21 through April 25, 2019, BTN surveyed travel manager and travel buyer members of the BTN Research Council and a randomly selected subset of qualified subscribers of BTN and Travel Procurement. Equation Research hosted the survey and tabulated the results, and totals were based on 314 respondents. Buyers scored their preferred chauffeured and ridehailing providers on a five-point scale.

### TRAVEL BUYERS’ RATINGS OF CHAUFFEURED & RIDEHALING SUPPLIERS

On a scale of 1 (poor) to 5 (excellent)

CHANGE SINCE  
LAST YEAR

Clean, well-serviced, new-model cars	4.49	Stayed at No. 1
Driver screening & duty of care	4.43	Stayed at No. 2
Quality of drivers who are suppliers’ direct employees	4.37	Stayed at No. 3
Availability of cars & access to agents & content	4.22	Stayed at No. 4
Pricing transparency during booking & payment	4.16	Up 2 spots
Quality of drivers who are independent contractors	4.15	Down 1 spot
Resolution of travel buyer & traveler complaints	4.11	Down 1 spot
Service consistency across affiliates	4.01	Up 1 spot
Negotiating pricing & amenities	3.94	Down 1 spot
Quality of data & reporting	3.88	Stayed at No. 10

Source: BTN survey of 173 travel buyers from March 21 to April 25, 2019



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*- Ruth O'Brien, Travel Manager - The Americas, Firmenich*

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## IHG Launches New All-Suites Brand & Updates Brand Designs

InterContinental Hotels Group has launched Atwell Suites, an upper-midscale all-suites brand that the company had teased in February. It's aimed at a "new target guest" the company's market research identified as an "opportunity seeker" who "views every trip as a chance to discover more. They use travel for personal growth." The business-to-leisure mix for the new brand is anticipated at 50/50, with guests staying an average of four to six nights.

IHG's research showed a market for guests looking for experiences and amenities that fall between traditional extended-stay and select-service hotels and estimates the segment to be worth \$18 billion. The studios will have kitchenettes—including counter-height refrigerators, microwaves, coffeemakers and sinks—but will not provide full cooking capabilities. The company found that the target guest does not like to cook, even when staying for a longer period of time. The rooms will be segmented for relaxing, sleeping and working and will be outfitted with IHG Connect Wi-Fi and with IHG Studio, which will allow guests to connect their smartphones to their rooms' 55-inch TVs. The king studio suite will be 321 square feet, and the double queen studio, with two queen-size beds, will be 409 square feet.

The public spaces will include flexible meeting rooms integrated into the lobby, outdoor space, "huddle areas" and public/private workspaces. Food options will include complimentary hot breakfast alongside coffee and cold, grab-and-go



Atwell Suites king suite

# 4 to 6 nights

**Average stay IHG expects for its new all suites brand**

options. A bar in the lobby in the evenings will serve small plates. Self-check-in on tablets will be near the front desk.

The new-build brand will focus on the U.S. initially. IHG plans to have the brand franchise ready in the fall of 2019, to begin construction in 2020 and to open its first property in 2021.

### Additional Brand Updates

IHG also updated the designs and prototypes for its Holiday Inn brand and for extended-stay brands Staybridge Suites and Candlewood Suites.

The H4 prototype for Holiday Inns is built on the brand's H4 interior design, which rolled out two years ago. It features a greater degree of flexibility and openness in public spaces, the new Toast to Toast food-and-beverage solution and adaptable meeting space.

The design for Staybridge Suites will roll out in October and will include an exterior design with a front porch; public spaces with shared workspaces, areas to socialize and more seating; and a new breakfast space that can transition to a lounge area and connect to the outdoor space.

Candlewood Suites is getting a new brand logo, along with a new design. The logo will begin to appear this summer, while the updated design will begin to roll out in December. Changes include an exterior with more windows, an open and modern lobby with communal areas and enhanced guest rooms with updated recliners, larger TVs, twice as much storage and contemporary kitchens with additional storage.

"We have seen a blend between business and leisure and how they work and enjoy life, during the week and on the weekend," said Americas CEO Elie Maalouf. "Unless you're in a resort location, most guests are doing a bit of both all the time, and many of our new designs cater to this new lifestyle." ■

## Winding Tree's Public Blockchain Platform Ready for Hospitality Bookings

Hobo Hotel Stockholm, a member of the Nordic Choice Hotels group, used Winding Tree to complete what the travel distribution platform claims is the first hotel booking on a public blockchain platform. Winding Tree said it's now ready for "real-world usage of public blockchains." Payments can be in the form of fiat currency, credit card or crypto-currency in the form of ether or Winding Tree's Lif tokens.

Public blockchains are not controlled by any one company, making them more secure than private blockchains, as there

isn't a central point of failure, said Winding Tree co-founder and CEO Pedro Anderson. "Because Winding Tree is built on public blockchain, airline, travel companies and blockchain developers can work together without having to trust a central company with their inventory. Instead they control their relationships and own their data."

Public blockchains, however, are slower and more expensive than traditional databases. Anderson said the company overcame those limitations by carrying out the more complex,

transaction-heavy functions on an open-source application programming interface level. "This allows us to maintain the advantages of decentralization but to make the platform scalable and cost-efficient," he said.

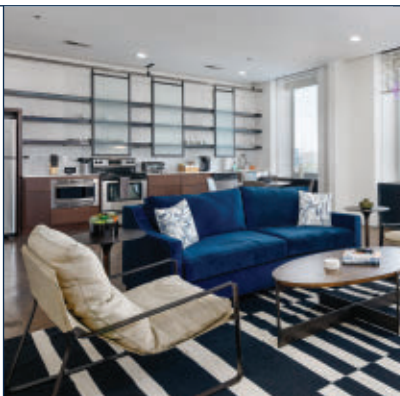
"We're not just giving customers the option to pay with bitcoin and saying, 'This is distribution on the blockchain,'" Anderson added. "We're providing a platform that allows the travel industry to create real change within an industry traditionally closed that relies on systems established nearly 30 years ago. The core of the platform is open source and distributed, which creates endless possibilities for real customer use, including lower costs, security, connectivity and unlimited innovation opportunities."

Winding Tree has partnered with, in addition to Nordic Choice Hotels, CitizenM hotels, Switzerland's Airport Hotel Basel, Air Canada, Air France-KLM, Lufthansa Group and Air New Zealand. ■

# Airbnb-Style Startup for Business Travelers Raises \$15M

Mint House, an apartment-style startup geared toward business travelers, received \$15 million in Series A funding, led by Revolution Ventures. Mint House CEO Will Lucas told BTN 60 percent to 70 percent of its users are corporate travelers. The company, founded in 2017, operates 200 units in Denver, Detroit, Indianapolis, Miami and Nashville and plans to add another 200 by summer 2019. An additional 250 units are in the pipeline, and Lucas said Mint House will enter 10 more cities within the next 12 months, including San Diego, Minneapolis, Louisville, Austin and Dallas.

Lucas started Mint House to marry the short-term rental experience with the reliability of a hotel. He preferred Airbnb and similar short-term rentals when traveling but when on the road for business was compelled to use hotels. "When on a business trip and on a tight schedule, I didn't have room for error and couldn't gamble with [a host] not being there or [me] not being able to find the room. [I saw] there was a need to professionalize the experience and improve upon usability, and we knew we could achieve that through smart application technology and elevate the quality across the board." That technology includes a mobile app that allows guests to book, check in, access services and amenities and communicate with a dedicated 24/7 concierge



A Mint House unit in the Lofts at the Reserve in Nashville

staff responding to guests across the country. In addition to the app, guests can book via the website, via online travel agency channel partners or via a corporate partnership.

The Mint House sales team directs outreach to corporations. "We find there is a lot of demand internally at organizations we've spoken to for this type of product, yet the travel department internally is unable to say yes to those demands," Lucas said. "A lot of companies are unwilling to let folks stay in unproven, unknown third-party residences on Airbnb. By providing security and trust, we can satisfy the internal needs and the travel demands a lot of companies are seeing."

Lucas said he's expanding Mint House's connection to corporate travel buyers now because, by the time the sales cycle turns over in the next 12 months, "we'll be in most of the cities where [companies] will want to place people and have travelers. Every company has a different system. Some are more formal, with RFP processes, and there's a six- to 12-month lag before we are added in [a corporate program]." But Mint House's rapid expansion will make it a viable option for corporate lodging programs. "For some of those more complex sales cycles and more complex steps you have to go through to be a preferred partner, those opportunities are opening up for us, and we can approach larger companies."

Revolution Ventures has participation from key hospitality executives, including former Starwood Hotels & Resorts Worldwide CEO Tom Mangas, former Travelocity CEO Carl Sparks and former St. Regis Hotels president Kerry Hatch. ■

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## Lufthansa's 2019 Strategy

Two of Lufthansa Group's top sales executives—hub airlines SVP of sales Heike Birlenbach and Frank Naeve, who took over as VP of sales for the Americas last month—gave an update on the airline group's direction this year.

### Growth

As one of the world's largest airline groups, Lufthansa intends to keep that distinction but "not with irresponsible growth," Birlenbach said. Within Europe, in particular, overcapacity is an issue, so the group plans to reduce its growth there, she said.

Routes to the U.S. are "always an opportunity for us," she said. Last month, for example, Lufthansa began direct service between Frankfurt and Austin, Texas. Further growth in the U.S. will be a mix of new routes, increasing frequencies on existing routes and expansion of the number of carriers within the group serving a destination, according to Birlenbach.

China and India are the markets outside the U.S. where the group is most looking to expand. The group also is looking at more destinations that serve primarily leisure travelers. "We used to focus more on just the business traveler in the past, but we've added quite a few destinations for pure leisure traffic," Birlenbach said. "We see a growth opportunity, especially because the leisure traffic on a worldwide basis is growing twice as fast as the corporate business right now."

That desire for more leisure business is also part of Lufthansa's interest in acquiring Thomas Cook's carriers, particularly its German airline, Condor. "Right now, there is so much going on in Europe, and the Lufthansa Group is really pushing consolidation," she said. "We like to take an active part in this consolidation process."

The group served 9.2 million passengers last year and plans to increase that this year, Naeve said.

### Distribution

Lufthansa Group has been one of the leaders in shifting corporate travel to direct sales and the New Distribution Capability from the traditional global distribution system approach. "We have already taken several steps, ahead of the crowd; that caused some turmoil in the last three years," Birlenbach said. "Because we really took a step in that direction and now have alternative channels for our customers, our direct channels are well established." The group has been growing the number

**Controlled Growth**

**Pushing Direct Connect**

**Lufthansa**

**TMC/booking tool**

of agencies connecting through direct channels. Direct connections, including bookings through the group airlines' websites, form about 50 percent of its volume, she said. The group still feels it is not where it would like to be and will continue to push forward on NDC initiatives, Birlenbach said.

In mid-May, the group became the first airline to earn certification for the International Air Transport Association's One Order initiative, which enables flight and ancillaries to be integrated under a single booking reference number per trip.

### Premium Products

Lufthansa will debut a new business class offering with more space, as well as aisle access for every seat, when it begins flying new Boeing 777X aircraft next year, Birlenbach said. Once that happens, it will install that new business class on its older aircraft, with the exception of those scheduled to leave the fleet soon.

In the meantime, as more new aircraft enter the group's long-haul fleet—in March, it approved a purchase of 20 Boeing 787-9 aircraft and 20 Airbus A350-900 aircraft that will begin delivery in 2022—the group will make decisions about how much space to dedicate to first class on aircraft. "Certainly, there are destinations that definitely have first class demand, such as coming to New York, but there are other destinations, like Canada, where there is no first class and never has been because there is no demand," Birlenbach said. "We cannot answer the question right now but will take a decision in the next few months."

The group sees a growing demand for premium economy, however, and plans to introduce a premium economy offering across all the group's aircraft in the future, she said.

### Technology

The Lufthansa Group has introduced Facebook Messenger chatbots. Elisa for Lufthansa, Nelly for Swiss and Maria for Austrian Airlines are named after each carrier's first female flight attendant. The chatbots can answer simple service questions and assist with rebooking when flights are delayed and canceled. The group plans to add more services via the bots, such as showing where baggage is and providing push notifications for delays and gate changes, and plans to make them available through the airlines' apps and websites, as well as through other messenger services like WhatsApp.

Birlenbach said voice is the next channel opportunity for shopping and selling, and the group is looking into collaborations. The group's biometric boarding program continues to expand, as well, Naeve said. ■

## WestJet Will Go Private in \$5 Billion Deal

Private equity firm Onex Corp. has agreed to acquire WestJet for \$5 billion. Onex would acquire all outstanding WestJet shares at \$31 per share, leaving the airline operating as a private company. WestJet shareholders will vote on the deal at a special meeting in July. WestJet board members unanimously recommended that shareholders vote for the transaction. The

price is a 63 percent premium to WestJet's average trading price over the 20 days prior to the announcement, so shareholder approval is likely, according to a research note by Cowen and Co. Pending regulatory approvals, the deal could close at the end of this year or in early 2020, according to WestJet.

Clive Beddoe, WestJet chair and one of its

founders when the Canadian carrier began operations in 1996, said, "Onex's aerospace experience, history of positive employee relations and long-term orientation makes it an ideal partner for WestJetters." Onex previously owned aerostructures manufacturer Spirit AeroSystems. The firm also made an unsuccessful attempt to acquire Air Canada in 1999 and to merge it with Canadian Airlines. Air Canada later acquired Canadian Airlines itself. Onex also was a part of a private equity consortium that tried to acquire Qantas in 2006.

WestJet would maintain its headquarters in Calgary after the acquisition, according to Beddoe. ■

## Mega Travel Management Company Apps

	MyCWT	BCD TripSource	Amex GBT Mobile
<b>Biometric Sign-In</b>	No	Yes	Yes
<b>View Past, Current &amp; Upcoming Trips</b>	Yes	Yes	Yes
<b>Sync with Calendar</b>	Yes	Yes	Yes
<b>Share Itinerary with Others</b>	Yes	Yes	Yes
<b>Booking Capability &amp; Enablement Costs</b>	<ul style="list-style-type: none"> <li>• Air</li> <li>• Hotel</li> </ul>	<ul style="list-style-type: none"> <li>• Air enabled for a fee</li> <li>• Hotel</li> <li>• Car expected this year</li> <li>• Rail expected this year; enabled for a fee</li> </ul>	<i>Currently for Neo users only</i> <ul style="list-style-type: none"> <li>• Air</li> <li>• Hotel</li> <li>• Car</li> <li>• Rail</li> </ul>
<b>Flight Search</b>	<ul style="list-style-type: none"> <li>• One-way &amp; round-trip</li> <li>• Filter &amp; sort</li> <li>• Best-time-to-book indicator of how the average fare will rise</li> </ul>	<ul style="list-style-type: none"> <li>• One-way &amp; round-trip</li> <li>• Filter &amp; sort</li> </ul>	<ul style="list-style-type: none"> <li>• One-way &amp; round-trip</li> <li>• Filter</li> </ul>
<b>Flight Content</b>	<ul style="list-style-type: none"> <li>• Negotiated fares &amp; branded fares</li> <li>• Preferred suppliers labeled</li> <li>• Sources include global distribution systems &amp; low-cost carriers</li> </ul>	<ul style="list-style-type: none"> <li>• Negotiated fares; branded fares expected this year</li> <li>• Preferred suppliers labeled</li> <li>• Sources include GDSs &amp; low-cost carriers</li> </ul>	<ul style="list-style-type: none"> <li>• Negotiated fares &amp; branded fares</li> <li>• Preferred suppliers labeled</li> <li>• Content from Neo booking tool</li> </ul>
<b>Noncompliant Flight Booking Notification</b>	<ul style="list-style-type: none"> <li>• Policy posted on page</li> <li>• Travelers must explain why they're booking out of policy</li> </ul>	<ul style="list-style-type: none"> <li>• Flights labeled as out of policy</li> <li>• Travelers must explain why they're booking out of policy</li> </ul>	<ul style="list-style-type: none"> <li>• Flights labeled as out of policy</li> <li>• Travelers must choose reason for booking out of policy</li> </ul>
<b>Flight Payment Options</b>	<ul style="list-style-type: none"> <li>• Individual credit card</li> <li>• Business Travel Account</li> </ul>	<ul style="list-style-type: none"> <li>• Individual credit card</li> <li>• BTA expected this year</li> </ul>	<ul style="list-style-type: none"> <li>• Individual credit card</li> <li>• BTA</li> </ul>
<b>Flight Alerts &amp; Check-In</b>	Yes	Yes	Yes
<b>Flight Modifications</b>	<ul style="list-style-type: none"> <li>• Click-to-call link to travel agent</li> <li>• In-app chat</li> </ul>	<ul style="list-style-type: none"> <li>• Click-to-call link to travel agent</li> <li>• In-app chat expected this year</li> </ul>	<ul style="list-style-type: none"> <li>• Click-to-call link to travel agent</li> <li>• In-app chat</li> </ul>
<b>In-App Flight Cancellation</b>	No	Yes	No
<b>Trip Disruption</b>	Agent proactively messages in-app	Click-to-call link to travel agent	Agent proactively messages in-app

CONTINUED ON PAGE 24

# App Analysis

## MyCWT

## BCD TripSource

## Amex GBT Mobile

<b>Hotel Search</b>	<ul style="list-style-type: none"> <li>Personalized results based on company's policy &amp; preferred hotels, as well as traveler's previous stays, profile preferences &amp; colleagues' booking histories</li> <li>Filter</li> </ul>	<ul style="list-style-type: none"> <li>Personalized results based on traveler's booking history, various filters, location radius, location of company's office, cost &amp; required amenities like a gym</li> <li>Filter</li> </ul>	<ul style="list-style-type: none"> <li>Personalized recommendations based on traveler's and colleagues' booking histories</li> <li>Filter</li> </ul>
<b>Hotel Content</b>	<ul style="list-style-type: none"> <li>Preferred suppliers labeled</li> <li>Sources includes GDS &amp; online travel agencies &amp; aggregators</li> </ul>	<ul style="list-style-type: none"> <li>Preferred suppliers labeled</li> <li>Sources include GDSs, OTAs &amp; aggregators</li> <li>Displays property's lowest room rate</li> </ul>	<ul style="list-style-type: none"> <li>Preferred suppliers labeled</li> <li>Content from Neo booking tool</li> </ul>
<b>Noncompliant Hotel Booking Notification</b>	<ul style="list-style-type: none"> <li>Alerts traveler if booked rate exceeds policy limits</li> <li>Requires justification for booking out-of-policy rates</li> </ul>	<ul style="list-style-type: none"> <li>Rates above policy limits are flagged with a red notation</li> <li>Requires reason code for booking out-of-policy rates</li> </ul>	<ul style="list-style-type: none"> <li>Requires reason for exceeding rate allowed in policy</li> <li>Approver is notified or prompted to approve</li> </ul>
<b>Hotel Attachment</b>	<ul style="list-style-type: none"> <li>Notifies traveler to book a hotel if the traveler has searched for one but not booked</li> <li>Notifies traveler to book if overnight trip is missing a hotel reservation</li> </ul>	<ul style="list-style-type: none"> <li>Notifies traveler four days before flight if hotel booking doesn't exist</li> </ul>	<ul style="list-style-type: none"> <li>Notifies traveler if hotel booking is missing &amp; provides three recommendations</li> <li>Shares information on amenities included in the rate</li> </ul>
<b>Hotel Payment Options</b>	<ul style="list-style-type: none"> <li>Individual credit card</li> <li>Business Travel Account</li> <li>Virtual card</li> </ul>	<ul style="list-style-type: none"> <li>Individual credit card</li> <li>BTA expected this year</li> <li>Virtual card expected next year</li> </ul>	<ul style="list-style-type: none"> <li>Individual credit card</li> <li>BTA</li> <li>Virtual card in some regions</li> </ul>
<b>Hotel Reservation Modifications</b>	<ul style="list-style-type: none"> <li>Click-to-call link to travel agent</li> <li>In-app chat</li> </ul>	<ul style="list-style-type: none"> <li>Click-to-call link to travel agent</li> <li>In-app chat expected this year</li> </ul>	<ul style="list-style-type: none"> <li>Click-to-call link to travel agent</li> <li>In-app chat</li> </ul>
<b>In-App Hotel Cancellation</b>	Yes	No	No
<b>Security &amp; Safety Alerts</b>	Yes	Yes	Yes
<b>Receipt Capture</b>	Yes	Yes	No
<b>Trip Assistance</b>	Includes map/directions to places in trip, airport maps, currency converter, tip calculator & travel documents	Maps and directions; import reservations made outside the program; add dinners, conferences and meetings so all trip details are in one place; store receipt images & import to expense tool; Visa/passport reminders; emergency response alerts with check-in functionality; & mobile version of travel policy for reference	Map integration & check-in integration
<b>Traveler Arranger Features</b>	Yes	Yes	Coming soon

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**Jennifer**  
Market Account Director



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