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BUSINESS TRAVEL NEWS



INNOVATE 2019
Pana co-founder & CEO walked away from BTN's annual competition with a dual win as Innovator of the Year & The People's Choice.
PAGE 12



GLOBAL
IAG inks deal to buy Spain's Air Europa. If approved, the carrier will sit beside Iberia & Vueling at IAG. Is it a merger to monopoly in Madrid?
PAGE 21

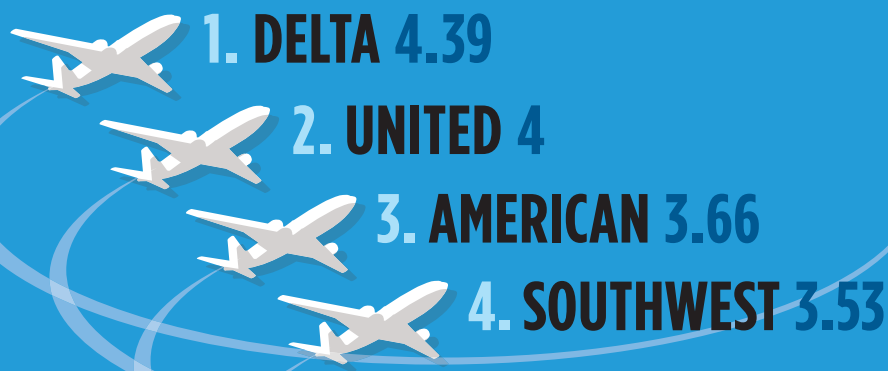


VOICES
Midsize travel programs have never had so many choices in structuring their hotel programs. Problem is, that makes it harder to optimize.
PAGE 36

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



BY MICHAEL B. BAKER

BTN'S 2019 AIRLINE SURVEY

Delta Leads, United Gains

Delta Air Lines is gunning for a decade at the top of BTN's annual airline survey. This year marks its ninth consecutive year, but United is looking to make its rival work for every win. Delta maintained its mighty score year over year at 4.39, but it didn't climb. Even so, the carrier once again grabbed the top mark in every survey criteria.

United, on the other hand, made big strides in 2019. The carrier's overall score jumped by more than a quarter point on the five-point scale and broke the four-point barrier for the first time. That's a feat only Delta has achieved until now.

American Airlines' score held steady year over year, despite operational challenges this summer. Southwest's score inched up. More than half of travel managers said relationships with air partners had improved over the past year. Still, the competitors are looking to fly higher to serve corporate clients in 2020 and beyond.

FULL STORY ON PAGE 8

Will NDC's Connectivity Kaleidoscope End in Confusion?

EDITED BY ELIZABETH WEST

New Distribution Capability-powered air bookings gained pace this fall with a kaleidoscope of connection types including aggregators, global distribution system and travel management company platforms and direct connects into TMC platforms and booking tools. While most NDC activity is still in its infancy, varied connection and commercial strategies could lead to confusion. Buyers should pay attention to connection types, content display strategies and cost differentials per channel.

Megas Experiment with GDS Platforms

Amadeus in late October launched NDC-enabled booking and servicing capabilities on its Selling Platform Connect for travel agents. The platform puts NDC content and standard content onto one screen so agents can compare offers across content types, according to the company. In addition,

agents can cancel or change NDC bookings on the platform.

"By integrating NDC into Selling Platform Connect, we're enabling airlines to better differentiate their offers and drive adoption of their NDC content, while also helping travel [agents] continue to work in their preferred environment," said Amadeus NDC-X MP Gianni Pisanello.

Flight Centre Travel Group and its business travel-focused division, FCM Travel Solutions, worked with Amadeus on the product. Nicola Ping, Flight Centre/FCM manager of air content and distribution for EMEA, said: "While it gives our consultants access to NDC content, it doesn't cause any disruptions to their typical business processes, as they are still booking in a familiar technology environment. It simply gives us access to more options, all in one place, to personalize

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Expense Reporting Is Too Painful



24%

Would rather get a cavity filled than fill out an expense report

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BCD Opens APIs & Development Tools to Third Parties

BY ADAM PERROTTA

BCD Travel is giving outside developers the ability to craft their own tech solutions to integrate with the travel management company's systems. BCD's new SolutionSource Developer Hub opens the TMC's application programming interfaces and developer tools to authorized third-party developers. Those include certain startups, established travel technology providers, online booking tools and BCD client corporations, according to the company.

"Authorized" is the key word there. Other developers can explore BCD's technical documentation and sample code, but BCD must authorize developers for security and other purposes before they can access an API, said SolutionSource senior director Irina Matz.

These authorized developers can access BCD's shopping and booking capabilities, itinerary and traveler identity information and policy rules engine and then leverage them to create "highly specialized solutions" in such areas as cost savings, duty of care and traveler experience, BCD said.

By more deeply integrating BCD's APIs, these companies can automate more processes, BCD said. For instance, a developer could apply client-specific hotel, air and car rates and policies automatically within BCD's shopping and booking capabilities.

Launched last month, Developer Hub enables access to the air, car and hotel shopping and



booking APIs, as well as BCD's itinerary data and traveler profile APIs, Matz said. Additional APIs will open up in the future. BCD Travel SVP of product planning and development Yannis Karmis said these are the "same APIs we use to power our own core solutions."

BCD expects existing partners in SolutionSource, the third-party technology marketplace that launched in 2018, to be among the first to take advantage. Many of those 19 partners—which include duty-of-care providers Anvil and International SOS; price-assurance operators Fairfly, Tripbam and Yapta; guest-booking specialist Pana; parking companies Park 'N Fly and SpotHero; and value-added tax-reclaim providers Taxeo and VATbox—already consume transaction and other data from BCD.

"Most of them are consuming our itinerary API or various standard data feeds from us," said Karmis, "but what we're hearing consistently back from them and other companies is that they're really looking for more access to deeper-level integrations with BCD." This, he said, would "allow for more automated transaction management or more automated flows." For example, Karmis said price-assurance providers that reshop booked hotels and airfares for better rates already consume BCD transaction data to monitor price drops, "but maybe they want to be able to automate more of that rebooking process."

Considering BCD client companies' different policies and different passenger name record formats across the globe, "we're able to say now, 'Here is this API,' and because it's orchestrated, it knows that this client is set up on a particular GDS. It knows these are the policies for that client to get a PNR submitted back to BCD. It moves that logic layer away from the developer, who doesn't have to deal with all that complexity, and shifts it back to our central configuration and admin functions that we've already set up at BCD. It simplifies the whole process." ■

Additional reporting by Jay Boehmer

ATG Will Use IBM's Watson to Improve Booking Experience

BY ADAM PERROTTA

Travel management company ATG is leveraging the natural language processing, information retrieval, automated reasoning and machine learning capabilities of IBM's Watson Assistant to deliver booking recommendations, based on the traveler's past bookings, via chatbot and voice command. "I've always found online booking to be tedious," said ATG CEO Tammy Krings, "and it's based on 25-year-old technology and hasn't really changed or kept pace with how people use technology today."

ATG will roll out a new smartphone app

that enables voice bookings. If bookers run into an issue during the voice-enabled booking, they can ask to be directed to a live person. Certain indicators also will trigger the system to ask users if they would like to speak to an agent. Booking capability for more common languages like English, Chinese and Spanish will be available by mid-2020, followed by others.

By the end of 2020, Watson-powered booking recommendations will go live on the voice bookings and on ATG's chatbot. The chatbot lives on an ATG dashboard

available on each client's intranet and via a secure website. The traveler will type or speak the date and destination for an upcoming trip and receive a tailored list of flight, hotel, rail, ground transportation and/or car rental booking options. Watson will deduce the traveler's preferences—for air, examples are preferred service class, seat type and time of day—from the traveler's past bookings. If the city is a new destination for the traveler, the system will base recommendations on the traveler's other trips and on colleagues' trips to that city, Krings said. "We realized we have so much data and we know so much about travelers' behavior, so it's all about using that data in a way that provides a better experience for our travelers," noted Krings.

ATG's dashboard allows access to third-party online booking tools, including SAP Concur and Amadeus Cytric, but the new offerings will not integrate with those tools. Instead, ATG will enable bookings via "a combination of inventory management and distribution tools," including the global distribution system, said Krings. ■



ATPCO Hits the Accelerator on Airline Dynamic Pricing

At its recent Elevate Conference, ATPCO unveiled a dynamic pricing model that enables airlines to more quickly get a larger number of price points out to the market, including personalized pricing. Part of that model consists of a road map to what ATPCO calls “continuous pricing,” in which airlines no longer would pre-distribute individual fares but instead could price based on a minimum and maximum. The range would depend on the traveler and circumstance. In the meantime, the model includes capabilities to expand fares beyond the alphabet-based Reservation Booking Designator method, as well as an “adjusted pricing” option, in which filed fares are adjusted based on the data of the shopping customer, for example. ATPCO chief strategy officer Thomas Gregorson spoke with BTN transportation editor Michael B. Baker during the conference to explain the model and what it could mean for corporate air pricing in the future.

WHY IS THIS NEW MODEL NEEDED IN THE AIRLINE INDUSTRY?

There were not enough price points to give the consumers choice. [Airlines] were creating new brands and new program offers, and they needed more price points to offer. The current ecosystem is constrained. We tried to unlock that by creating more variable updates, which is the quantum pricing, and more recently, the dual RBDs, to remove the number of limitations on the number of price points we have. That’s been popular. We have more than 30 airlines using it in a lot of different dimensions, and they’re creating more products with more price points to give the consumer more choice, so they’re not locked into a one-size-fits-all dimension.

SO BREAK DOWN THE DIFFERENT OPTIONS.

We have three flavors. [The first is] optimized pricing, which is just improving the current [method]. That’s in production and being used by many airlines and continuing to be adopted by more. We have the adjusted pricing, which is what we’ve been piloting for the last year. We’re allowing the airline to be able to adjust the price at the time of the shopping transaction. They’ll be able to say, “Here’s a bunch of prices that I have, and I want to adjust it up or down depending on the shopping transaction to make it more palatable for what I want to package with the offer.” We just did an implementation guide and have standards that need to be implemented so that it’s effective. We’ll work through that over the next period of months or so in order to get that into production. The more difficult of the steps is how to get to continuous pricing, which is the third bubble. You don’t have any set prices but are doing everything on the fly. We’re going through piloting, experimentation and early discovery of that. There’s a lot of blocks we have to figure out on that journey. It’s going at a good pace. It’s hard to change the whole



ATPCO’s Thomas Gregorson talks:

- A future beyond pre-filed fares
- Transparency & availability in dynamic pricing models
- Corporate buyers’ role in hashing out the issues

industry ecosystem to be able to adopt these things. If we could pick one, it would have been a lot easier, but one doesn’t fit all markets, customer segments or methods, so that’s why we had to create the variability.

HOW MANY CARRIERS ARE TRYING ADJUSTED PRICING RIGHT NOW?

We had about six carriers doing the pilot. That was part of an industry work group, where we had 100 or so participants engaged in the process, and we’re sharing the learnings.

WITH SO MANY MORE PRICING OPTIONS, WHAT DOES THAT MEAN FOR TRANSPARENCY FOR THOSE SHOPPING FOR AIRFARES?

That’s more of a [New Distribution Capability] question than a dynamic pricing question. If people are using more and more offers in the marketplace, will they be transparent for the rest of the world? The way the world has evolved so far is: Public fares, the ones that are transparent, are growing [in number] at a much higher rate than the private or negotiated fares. It seems the market does like transparency. What we are implementing as part of this package to support it is a new concept: public tariffs with limited distribution. Here’s a public price that you can tell the public about, but you can only come through the NDC channel or another channel in order to get it. That will keep the pricing transparent. Consumers will know about it, but they might be directed where to go shop and buy to get the best price.

WHAT WILL THIS MEAN FOR THE WAYS CORPORATIONS CONTRACT WITH AIRLINE PARTNERS?

That’s one of the biggest questions. Where there’s change, there’s opportunity. One of the biggest challenges is how you can make sure you have a win-win corporate agreement. An airline goes in saying, “I’d like 100 percent of your business or a lion’s share, so what do I need to commit in order for you to do that?” When you have variability in price, how do you commit to something that gives them comfort that they’re getting the best price? That will all be worked out as part of how we reshape the corporate agreement.

YOU HAVE A WORKING GROUP THAT IS HELPING TO FORM, TEST AND CARRY OUT ALL OF THIS. HAS THAT INCLUDED REPRESENTATIVES FROM AGENCIES OR THE CORPORATE TRAVEL SPACE?

The dynamic pricing working group is open to all. It’s an open forum. We have very large attendance in those groups, and we have all the disciplines covered. Agencies and corporates—we could use more, so we’d welcome [that to] get more feedback. We’re trying to create an industry solution that works for all sides. [Corporates] have the biggest questions: How is the corporate program and the corporate offer going to be shaped, and how do I create a relationship with the airline that I’m going to give my corporate budget to?

WHAT PROGRESS DO YOU ANTICIPATE OVER THE NEXT YEAR?

We’ll see if the adjusted offers become more of the mainstream over the next 12 months and whether that’s something that takes shape. We might find that’s really just a niche product and jump to how to do the exploration of continuous [pricing] and work through that. It will shape how far and how fast we go in different disciplines. ■

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Business Travelers Find Company Travel Tech Lagging

Corporate travelers want better travel technology from their employers as well as more options when it comes to booking travel, according to a study commissioned by SAP Concur. The survey, conducted by Wakefield Research between July and August 2019, collected responses from 7,850 business travelers who take three or more trips per year from 19 global markets.

WHO TOOK THIS SURVEY?

58% **MANAGED TRAVELERS**

Company has "structured" travel policy

36% **LIGHTLY MANAGED TRAVELERS**

Company has "unstructured" travel policy

6% **UNMANAGED TRAVELERS**

Company has no particular travel policy

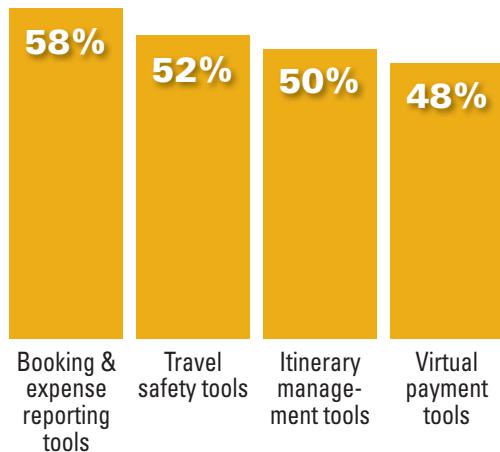
TRAVELERS GIVE THUMBS DOWN ON COMPANY TRAVEL TECH



67%

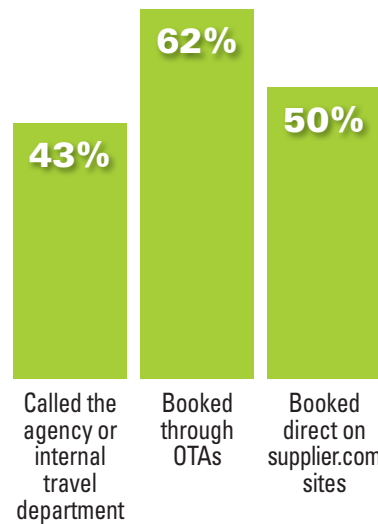
Believe their company lags behind when it comes to adopting the latest technologies to make business travel easier

TOP OF THE LIST FOR IMPROVEMENTS



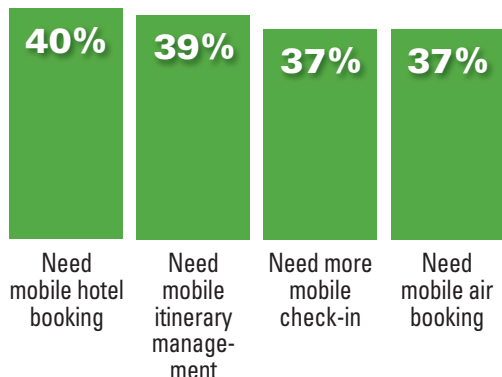
BREAKING OUT OF THE MANAGED BOOKING TOOL

64% of travelers surveyed had a managed booking tool. Among these ...



... for at least some of their business trips.

GET MORE MOBILE



EXPENSE REPORTING IS TOO PAINFUL



24%

Would rather get a cavity filled than fill out an expense report



43%

Not reimbursed for an expense in 2018, either because they didn't feel it was worth reporting or their company failed to reimburse



\$893

Average trip expenses for which business travelers were not reimbursed in 2018

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BTN'S 2019 AIRLINE SURVEY

Delta Nabs Ninth Win as United Shows Stark Improvement

BY MICHAEL B. BAKER

Delta extended its record-long reign at the top of BTN's Airline Survey, earning the top overall score from corporate travel buyers and agents for the ninth consecutive year and once again leading in every individual category measured in the survey, including quality of data and reporting, which was added this year. United, however, narrowed the gap considerably this year, upping its score by 0.27 points on the survey's five-point scale year over year and cutting the gap between it and Delta by nearly half. With that, United easily maintained its second-place rating from last year, as American Airlines and Southwest Airlines remained in third and fourth place, respectively. No airline's total score declined year over year, and overall sentiment in the survey reflected that, with 51.8 percent of respondents saying that they have seen their airlines' customer service improve over the past year and 43 percent saying that customer service had remained the same. Only

5.2 percent said their customer service had worsened over the past year.

Delta Dominates Again

Delta earned an overall score of 4.39 in the survey, unchanged from its score in 2018, and it remained nearly four tenths of a point above its nearest competitor. Its scores were up year over year in five categories, including its strongest category: quality of customer service.

"Delta Air Lines is top notch," one buyer wrote in the survey's open-ended section. "They treat all business travelers with care and put programs in place to continue to make our travelers feel important."

One of Delta's focuses in recent years has been "reducing the seams" among its partners, including those benefits for business travelers, Delta VP of sales operations and development Kristen Shovlin said. After aligning its Corporate Priority benefits—which include priority

boarding, priority rebooking during irregular operations and waived fees in selecting certain economy seats—with Air France-KLM last year, both Virgin Atlantic and Aeromexico adopted them this year. Delta is working with Korean Air and WestJet to do the same, Shovlin said.

As such, Delta's joint businesses also earned the highest scores in the survey, with its Air France-KLM/Alitalia partnership and Virgin Atlantic partnership each earning a score as high or higher than Delta's score itself. Earlier this year, the plan to sync the Air France-KLM and Virgin Atlantic partnership into a single joint venture gained antitrust approval from U.S. regulators.

"We have employees embedded in their organization, and likewise, they have employees in ours," Shovlin said of Delta's partner airlines. "When we look at partners, it's not just making sure our network expands but that travelers are able to transcend across those partners."

Delta's overall network, partnerships and frequencies also earned a higher score year over year from buyers, as Delta has "continued to focus on top business destinations," SVP of global sales Bob Somers said. Delta now is targeting a new geography with plans to form a joint partnership with Latam, which it wooed away from American Airlines once their planned joint venture hit a regulatory snag in Chile. Delta also is building its service out of Tokyo's Haneda airport with newly won slots this year, with which it will "dig deeper and try to expand our footprint in Asia" in tandem with its Korean Air partnership, Somers said.

Distribution strategy was another area of improvement for Delta this year, for which Somers pointed to Delta's work with ATPCO on developing next-generation storefront standards and technology. Delta has taken a hard line with some of its distribution partners in pushing the standards, which are designed to make the amenities and restrictions associated with ticket types clearer, including pulling its content from TripActions earlier this year until it was able to meet its display demands.

"Travelers deserve a premium shopping experience, and we're working on driving that through the managed travel side with good collaboration and partnerships with agencies, [global distribution systems] and corporate travel managers," Shovlin said.

In addition, Delta tweaked its offerings on meetings this year, another area in which its scores improved. For example, it made access to fares for those registering through its platform more quickly available, and it added real-time data on top destinations, region-specific data and back-end payment details to its Delta Edge Meetings tool.

With nearly a decade on top of the survey, Delta's performance has become something of an expectation from buyers. "There have not been any surprises," one buyer wrote in the survey. "Their operation is one that works, passengers are happy and account managers continue to be creative."

For Delta, however, the survey itself has become an annual goal to hit, not just for the sales team but across the carrier, Somers said.

"It never gets old for us," Somers said. "It's a motivator for us to continue and lead the industry in as many things as we can. We want to continue to win this award, because it's voted on by our customers."

United Breaks Away from the Pack

Speaking at a recent Media Day event in Chicago, United CEO Oscar Munoz said 2019 was the year "that we've taken the narrative about United from 'What's wrong?' to 'What's next?'"

The progress shone through in survey results this year, as United was the only carrier to improve its score year over year in every single category. After several years of a close head-to-head battle with American Airlines, United distanced itself from its competitor by more than three tenths of a point. United also cracked the four-point barrier in its overall score, the only carrier besides Delta to do so in recent survey history.

Under Munoz's leadership, part of United's overarching strategy has been to empower its employees to solve issues rather than having to rely on strict rules or protocol—enabling flight attendants to hand out a drink voucher to a customer having a tough time, for example. That attitude has affected the sales side as well.

"United has done an amazing job of increasing their sales support," one buyer said in the survey. "They have a much more flexible approach to help solve problems and deliver value to my travelers."

The carrier has been particularly busy with new products for its corporate customers in recent years.

"We took a scientific view in how to approach the marketplace and identified product gaps in the corporate space," SVP of worldwide sales Jake Cefolia said. "We set about closing those gaps this year."

That has included continued work on its Jetstream portal, introduced in 2017, for which United is "constantly looking at ways to make that a better tool for customers," Cefolia said. Earlier this year, United added a meetings portal, through which meeting organizers can register meetings and get discount offers within 24 hours. United also migrated its prepaid PassPlus program to the Jetstream portal this year, making management of the program more automated, and it plans to move its PerksPlus corporate rewards program onto the portal next year.

One buyer in the survey noted that Jetstream "has reached a great maturity in usability, combined with an excellent set of features."

In addition, United launched a corporate discount program for mid-size travel programs, Propel, last year. This year, it has signed up more than 500 new accounts to Propel, Cefolia said.

United's highest scoring category was its network, partnerships and frequencies. The carrier has been building service significantly from its hubs over the past few years, which Cefolia said for the sales team has been "an important lever to achieve the results we want."

Both United's transatlantic partnership with Air Canada and Lufthansa and its transpacific partnership with All Nippon Airlines earned scores around the four-point mark. Like Delta, United is working on aligning more with its partners, including a new pricing model it is working on with the transatlantic joint venture.

"Rather than Lufthansa pricing westbound, Air Canada out of Canada and United out of the United States, it now is one-time pricing globally for those accounts,"

Cefolia said. "It's greatly improved our speed to market."

The carrier now is working on developing a joint venture for Latin America with partners Avianca, Copa and Brazilian carrier Azul.

Distribution was another high-scoring area for United, to which Cefolia said the carrier has taken a "flexible" approach. It has been on the forefront of a few NDC initiatives, including making NDC content available through TripActions in the form of ancillaries and bundled fares, but United "isn't looking to force anyone into" NDC content, Cefolia said. "We want to be on any shelf the customer wants to buy on," he said.

American Holds Ground During Tough Year

American Airlines, which declined to provide an interview for the survey issue this year, kept its score steady year over year. Its score improved in five categories, including meeting pricing flexibility, negotiating services and amenities, client communications, account manager relationships and customer service quality.

Operationally, American has faced a tough year. While already facing flight schedule disruptions related to the grounding of the Boeing 737 Max, it also has faced challenges related to labor negotiations with its mechanics and fleet workers.

On the carrier's third-quarter earnings call, CEO Doug Parker said that while he believed those operational issues "are now behind us," focus on operational improvements remains at the forefront.

"We must restore American's operational reliability to the standards

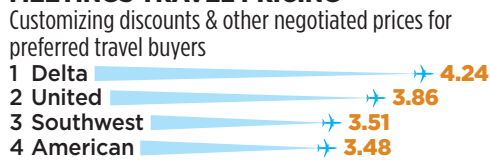


BTN'S 2019 AIRLINE SURVEY

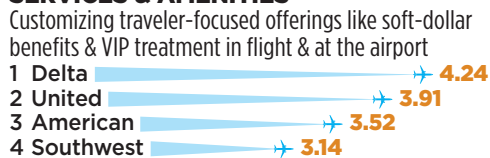
TRANSIENT PRICING



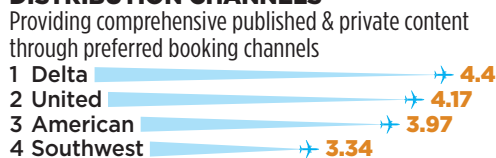
MEETINGS TRAVEL PRICING



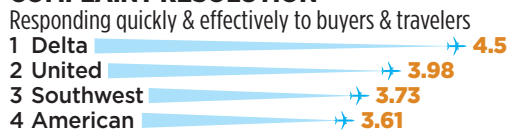
SERVICES & AMENITIES



DISTRIBUTION CHANNELS



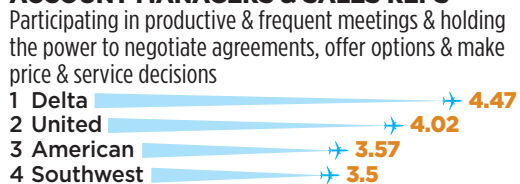
COMPLAINT RESOLUTION



COMMUNICATION WITH BUYERS



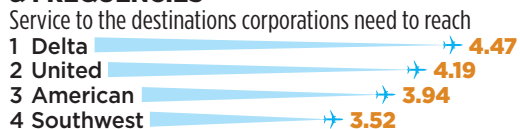
ACCOUNT MANAGERS & SALES REPS



CUSTOMER SERVICE FOR TRAVELERS



NETWORKS, PARTNERSHIPS & FREQUENCIES



VALUE



QUALITY OF DATA & REPORTING TOOLS



of excellence that our customers and team members deserve,” Parker said. “We simply will not allow our customers and team members to experience another period like this past summer again.”

American also recently announced a significant restructuring of its commercial and operations teams, which American Airlines president Robert Isom said would help the carrier “find a way past temporary difficulties and make American better every day.” That restructuring moved SVP of global sales and distribution Alison Taylor to report to SVP of revenue and head of the revenue division Don Casey, intended to get revenue initiatives to market quicker (see page 22 for more on American’s restructuring).

Those initiatives include work around NDC, and American’s highest score was in the distribution category. American has been testing corporate bundles with travel management companies including AmTrav, Copastur in Brazil and Marplay in Mexico that include main cabin Preferred Seats, an extra bag and the ability to change the ticket. It also has worked with American Express Global Business Travel, which this summer began processing live booking using NDC standards via Amadeus Travel’s application programming interface.

American scored well for its network, partnerships and frequencies as well. The carrier finally was able to get antitrust immunity for its joint venture with Qantas this year, after facing rejection in 2016. While losing its partnership with Latam was a blow, the carrier is exploring ways to make that up as well.

“The great news is that our network by far is the best in South America, and there’s a lot we can do to augment that on our own,” Isom said in the earnings call. “The network we have in South America could be really attractive to a lot of partners, so we’re busy exploring and evaluating the opportunities that are out there right now. So, good things to come.”

Southwest Deploys New Strategy

Although remaining in fourth place this year, Southwest Airlines closed the gap a bit on American Airlines as it improved its score in all categories year over year with the exception of one: meeting pricing negotiation, which was the same year over year.

Distribution was once again one of the areas in which Southwest’s score lagged, but that could soon change with its “bold new distribution strategy” announced this year, VP of Southwest Business Dave Harvey said. Among the biggest

announcements was that Southwest would be providing content and full booking capabilities to both Travelport and Amadeus by mid-2020, meaning buyers and agents will be able to book, change, cancel and modify reservations through the GDS. Southwest also joined ATPCO’s NDC Exchange platform, through which it already has announced connections to TripActions and AmTrav, and “we literally have 10 more in the pipeline,” Harvey said.

Southwest is improving its direct approach, with “some major releases” planned for its Swabiz channel next year, Harvey said. In addition, Southwest has been investing in its API and earlier this year eliminated the access fee to it.

“Some of the big online booking tools were passing that fee on to the buyers and adding additional fees,” Harvey said. “Getting it out of the way lowers the overall cost of sale for our buyer and the agency.”

In addition to distribution, that also gives Southwest an extra edge in what has traditionally been its strongest performing category in the survey: overall price value. This year was no exception, with Southwest outscoring United in that category and coming closer to Delta in that respect than any other airline in any other category this year.

“Clearly, that’s our low fares, no change fees and no bag fees carrying the day,” Harvey said.

Complaint/problem resolution was another strong-scoring category for Southwest. Harvey credited that to a new B2B partner service desk set up earlier this year, at which a “small but mighty team” helps the carrier’s top buyers.

Southwest’s other big focus of late has been establishing and growing its service to Hawaii, including its recent announcement that it would be adding service from San Diego to both Honolulu and Kahului. While Hawaii might seem like a mostly leisure play, it’s also helped Southwest win some new corporate business, particularly thanks to its interisland service, which broke up what essentially was a monopoly on the routes by Hawaiian Airlines.

“We’ve been picking up quite a few local Hawaiian Islands accounts: banks, education and utilities,” Harvey said. “West Coast businesses, folks based west of the Rockies, also tend to do more transient travel to the islands, so extended travel agreements with them has been a nice windfall.”

Ultimately, Southwest would like to develop an international network via interlines and codeshares with partners in Europe, South America and Asia, though Harvey said that is still “several years off.” ■

METHODOLOGY From Sept. 12 to Oct. 11, BTN collected 705 responses from travel manager and buyer members of the BTN Research Council and subscribers of BTN and Travel Procurement and 95 responses from travel agents. Fourteen percent of the travel buyers spent less than \$500,000 on U.S.-booked air volume in 2018, 11 percent spent \$500,000 to \$1.9 million, 39 percent spent \$2 million to \$12 million, and 37 percent spent more. BTN developed the categories with travel buyers, corporate travel agency managers and airline sales executives. The categories were the same as the 2018 survey with one addition: quality of data and reporting tools. BTN 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 and JetBlue elicited responses from less than 30 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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KEEP CLIMBING





Pana Wins 2019 Innovator of the Year Award & People's Choice Award



Devon Tivona

“You’re great at a niche and [solving] an area that’s really needed for nonemployees and invitees,” said Norm Rose, judging in the final round of BTN’s Innovation Faceoff. That was music to the ears of Pana co-founder & CEO Devon Tivona, who launched his company in 2014 and has pivoted

more than once to find the right fit in the managed travel ecosystem. The only thing that could make it better? The audience at Innovate came to the same conclusion as the judges, voting “overwhelmingly” to name Pana as the 2019 People’s Choice, according to BTN Group executive director of conference content and strategy David Meyer.

What Does Pana Do, Exactly?

Even in a well-managed travel program, the process for booking and reimbursing travel for job candidates, contractors, meeting attendees, speakers and other guests usually differs from employees. It often requires human resources managers or administrative assistants to act as part-time travel agents, but without the professional tools. Long email chains among a travel coordinator, the guest and maybe a travel management company get untenable. Payment and reconciliation can

be a mess. Worse, guests themselves may not quite know what’s expected from the process.

The result, said Tivona during his Innovate pitch last month, is “a brand-risking experience because this is the first time your guests are traveling for your company, and they are seeing all of this messy back and forth in your travel arrangement.” Pana steps in to clean that up with a platform that handles booking, service, payment and reconciliation. The goal, he said, is to make guest travel simple and efficient for companies while improving the guest travel experience.

Pana uses an “automation engine” that takes trip choices out of the traveler’s hands, according to Tivona. It also puts the Pana agents in play to take most of the trip support out of the host company’s hands.

The platform incorporates conditions like the traveler’s hierarchal position (e.g. executive versus intern), the route, location, trip length, travel policy and other conditions to determine which options are approved to book and also the best options for travelers, like the best airport for arrival or the best hotel for executives. “It’s answering thousands of traveler questions about those decisions in seconds,” said Tivona.

If there is a delay within the trip, Pana automatically reaches out to the traveler and notifies the company of the late arrival. Throughout the trip, the traveler receives proactive guidance and can send questions via text, email or Pana’s mobile app and receive an answer in less than five minutes from Pana’s 24/7 travel agent support team, Tivona said. Reimbursement is similarly simplified. Travelers snap a photo of meal or incidental receipts and upload to the app; they receive the funds

within 24 hours.

Pana hangs onto guest traveler data for a couple of months in case they are invited back to the company for another interview or engagement. Otherwise, the data is purged according to GDPR regulations.

Expanding Use Cases

In the last two years, the company has expanded its use cases, from handling onsite interview travel in 2017 to new hire trainings, interns and corporate visitors like consultants in 2018 to simple meetings, contractors and VIP travelers in 2019, Tivona said. Today, Pana counts more than 150 enterprises as clients, including biopharmaceutical and technology companies.

Pana partners with travel management companies, allowing travel managers to integrate Pana with their existing programs. “You can get your negotiated air and hotel rates, your existing duty of care solution, your centralized reporting and your price assurance tracking without any additional work for you,” he said. It was one of BCD Travel’s first SolutionSource partners.

Pana’s team employs over 150 agents around the world and equips them with proprietary dashboards loaded with client travel policies, a chat system and a customer relationship management tool. Both domestic and international travel are supported 24/7.

“It’s been fantastic over the last four years building a business, getting to know this community and understanding how we can add value. We’re here to help travelers and to make travel more about why you are going and less how you get there.” —*Dawit Habtemariam*

THE JUDGES



NORM ROSE

President Travel Tech Consulting & Sr. Tech Analyst Phocuswright



KURT KNACKSTEDT

CEO Troovo Technologies



CINDY HESTON

Director of Travel & Events Anthem



STEVE CLAGG

Travel Technology Manager Microsoft

Innovate Honorable Mentions

BIZLY

Bizly's latest iteration started with three years of listening, not only to travel and event managers but also to a variety of stakeholders including administrative assistants, TMCs, human resources, sales and marketing, vendors and suppliers on what their pain points were and what they wanted in an event planning solution. The result is a highly customizable and collaborative platform dubbed Bizly 2.0 by founder and CEO Ron Shah.



Ron Shah

Shah pitched the solution's multiple event templates alongside its customizable users models. He demonstrated the tool's ability to synchronize event stakeholders in real time and how it automates project management. With Bizly 2.0, users create guest lists and invites, house communications, do sourcing, put in room blocks and more. In search, Bizly will take the preferred hotel program, group preferences, group size and give the top three options, dynamically. The software then bundles the event together, so the planner can compare options. Plus, Shah said, it's intuitive for the occasional user.

"If you can use a smartphone, you can use this," he said, adding that the analytic capabilities were extensive, and Bizly can integrate with other systems via friendly APIs.

"We were very impressed at the obvious time spent collecting feedback, hearing from the market, hearing from all sides," said judge Kurt Knackstedt. "We really don't see that enough in the industry. And the little things, like the project management piece, it's not just about focusing on one part of the meeting, like sourcing or attendee registration, but [understanding] the entire plan that goes along with it."

— Donna M. Airoidi

HRS INVISIBLE PAY

Maximilian Waldmann's Conichi won BTN's Innovator of the Year in 2016. Since then, hotel solutions company HRS acquired the company, took the best of what Conichi offered, added to it, and unveiled its latest payment platform, Invisible Pay, at this year's Innovate. The product enables advanced payment automation for hotel stays and aims to provide a two-click solution for travelers, thereby reducing the friction in the booking, payment and expense process, and easing traveler check-in/check-out.



Max Waldmann

When a traveler using HRS books a hotel (click one), Invisible Pay will create a virtual card and guarantee that it will be accepted at the front desk. At the end of the stay, the traveler can split the invoice by easily adding another card for ancillary purchases, if they wish. HRS then collects the invoice to ensure it is correct and forwards it into the expense tool. The traveler acknowledges the expense receipt (click two), and they're done.

"The beauty of Invisible Pay is it works with all the leading OBTs and leading payment tools," said Waldmann, who is now HRS's COO of Invisible Pay. "All the companies have to do is tell us what their preferred tool is, the preferred payment provider, and we'll take care of the rest."

This platform "shows great vision" and a "streamlined experience," said Innovate judge Steve Clagg. "There are a ton of benefits, in both the savings and the improved traveler experience. It sends a very strong message, and I think everyone wants to do away with those painful hotel payment experiences." One caution noted by the judges was the sustainability of the model, which Waldmann said includes a large number of "boots on the ground" to ensure the program works seamlessly at the hotel front desk. — Donna M. Airoidi

TRIPBAM

Tripbam is another past BTN Innovator of the Year, from 2014. The company's newest feature took aim at the annual hotel RFP process. Tripbam now leverages its hotel intelligence tool to find locations where there is opportunity for savings with sourced hotels. It will identify high-performing hotel candidates—according to Tripbam's proprietary grading system—and target them for the buyer. If acceptable, the travel manager loads their room nights and volume, Tripbam calculates the target rate for the market and sends an email to the hotel with an "accept" or "reject" option. If accepted, rates automatically load, while Tripbam systematically audits and tracks hotel performance against availability and rate.



Steve Reynolds

Tripbam has tested the feature with 10 clients. Of the 51 offers sent, 74 percent were accepted. "There was no haggling, no back and forth, [the hotel] just said yes, clicked the button and it was accepted," said co-founder and CEO Steve Reynolds. If the hotel rejects the offer, it has an opportunity to say why, and the client can choose to resubmit.

Further, Tripbam can notify travelers there is a new preferred hotel in the system and automatically rebook them to the new property. That's an option Reynolds called Smart Share Shift.

One drawback noted by the judges was that the tool is designed to work with one hotel at a time; buyers cannot bulk upload hotel targets for a larger sourcing effort. Even so, the judges saw major benefits. "What you have given us is this view of every bit of information we need to know," said judge Cindy Heston. "So when we do push that offer out, we're knowledgeable and not coming across as trying to undercut [the hotel]. The whole beginning to end scope was brilliant, and the other thing I love is the instant value. That's pretty paramount." — Donna M. Airoidi

THE COMPETITION

30 SECONDS TO FLY

"The main problem with TMCs is that they rely on a workforce which is old, difficult to find, not tech-savvy, difficult to train and expensive," said 30SecondsToFly CEO and cofounder Riccardo Vittoria, pitching chat-bot Claire, which has pivoted from its original end-user focus in 2016 to a new agency-focused platform today.

The basics are similar: Claire uses natural language processing and machine learning algorithms to "deeply understand who the traveler is and what he wants," Vittoria said, as it interacts via text with the traveler. The platform pulls in the company's travel policies, the traveler profile and corporate negotiated rates; it asks about the traveler's personal preferences and pushes relevant bookable options to the end user. Yet a service-oriented agent enabled with Claire also has access to these interactions and can step in whenever needed. Simultaneously, the AI studies the human interactions to improve future automations.

Innovate judges appreciated the efficiency Claire provides to agents, freeing them to focus on complex trip issues. They loved one end-user feature: Claire's availability on Slack, Facebook Messenger and SMS. However, given the crowded landscape for chat-bots, the judges questioned whether Claire could differentiate itself. — Dawit Habtemariam



Riccardo Vittoria

BCD TRAVEL

Travel management company BCD Travel in October launched its SolutionSource Developer Hub, which allows third-party developers access to the company's core application programming interfaces, enabling them to build custom solutions for the company's corporate clients, said Irina Matz, senior director of BCD's SolutionSource.



Irina Matz

Authorized third-party developers can visit developer.bcdtravel.com and access BCD's APIs to see available data, code or existing tech for a variety of functions: shopping and booking capabilities, itinerary information, traveler profile information and policy rules. The idea is to drive deeper integrations and more advanced functions, said Matz. For example, "It can be used to better automate some of the price assurance products for better shopping and rebooking capabilities, or it can power data analytics platforms to improve the traveler experience end to end," she said.

The judges applauded BCD on its open platform and ecosystem to allow third parties to participate in its systems and encouraged the company to continue down that path. However, they asked about expense tools and end payment options, which Matz said would be coming in the near future. — Donna M. Airoidi

CORNERSTONE

Cornerstone VP of product and marketing Jorge Alvarez presented his company's new product, PoliSee, a traveler behavior nudging tool, which will be launched in the first quarter of next year. PoliSee collects booking data through numerous API integrations, analyzes the data to find opportunities where travelers can book in-policy or make better booking decisions and then deploys these nudges as informational labels, tips and scorecards on booking tools, browser via web extension or email.



Jorge Alvarez

Cornerstone demonstrated three types of nudges: education, anchoring, and social/trend. Education explains why travelers should make a decision. Anchoring shows traveler choices compared to an optimized choice; social/trend focuses on popular options within their company. Over time, the nudge technology learns individual traveler behavior and how to influence it, according to Alvarez.

"Everyone knows how hard it is to nudge people in the right direction if they [have] a preferred airline, preferred hotel or a conference," said Rose. The judges concluded it's too early to determine PoliSee's efficacy, since the product just launched, but commended its innovation potential. — Dawit Habtemariam

CONTINUED ON PAGE 14



CONTINUED FROM PAGE 13: THE COMPETITION

NINA & PINTA

Nina & Pinta partner Jo Lloyd presented an interactive air data dashboard. Lloyd said the dashboard brings simplicity, transparency and insight into air programs and reaches down into the small- and midmarket with self-serve capabilities. The tool drills into contract usage by country, city pair, points of sale, carrier, amenities, fare class and more. Travel managers, she said, can have the same data that airlines have but in a consolidated format across all carriers, "which, in turn, gives you the ability to punch above your weight," in negotiations.



Jo Lloyd

Travel managers can upload contracts in any file format and see their spend commitments, contract overlap, points of sale, top city pairs and fair market share. They can compare, rank and filter contracts by various details like point of sale and route. Data aggregators can feed out-of-channel data to the tool, Lloyd said.

The tool's user interface and ability to reduce air RFP complexity impressed the judges. The lack of modeling was a miss, however; and judges questioned the tool's positioning in a crowded field, citing a growing TMC and consulting company focus on air analysis. — *Dawit Habtemariam*

PREDICT X

Big Data analytics provider PredictX pitched its air sourcing tool, PredictX Navigator, in a back-to-back pitch with Nina & Pinta. PredictX director of product Simon Carmouche presented.



Simon Carmouche

PredictX Navigator automates sourcing research and dynamically evaluates contracts. On the one hand, Navigator pulls in booking data from 85 different sources, including NDC. On the other, it accepts air contracts in multiple file formats.

The tool evaluates and compares proposed and existing contracts against routes and pricing. It measures program performance and quality against market benchmarks, forecasts demand and simulates the impacts of shifts in pricing and market share. PredictX focuses on enterprise clients.

The judges were impressed with Navigator's ability to aggregate content from multiple sources. They also liked the tool's what-if scenario modeling but noted the air analytics space is very crowded and complicated, making product differentiation difficult. Carmouche timed out on the pitch, but the good news is the judges wanted to hear more. — *Dawit Habtemariam*

TRAXO

Traxo pitched Connect for SME, as solution for data capture and reporting for lightly managed, small and midsize programs. Sales VP Chad Costa presented.



Chad Costa

Connect filters and parses travel confirmation emails via an email server rules integration. The tool captures travel data from thousands of booking sources, then organizes it into a dashboard for travel managers. "With a press of button, they can find out where travelers are or where they are going before, during or after a trip," said Costa. He emphasized the duty of care function, but also noted access to other data details like the booking source, supplier, spend, etc.

Innovate judges lauded Connect's ability to aggregate off-channel data and noted that reporting on such bookings was critical for all programs. However, they said, many travel programs already get off-channel booking data from expense systems. On the technical side, judges were concerned with getting approval for an email rules integration; they also remarked on distinguishing between leisure and corporate confirmations, which opened issues around employee privacy. — *Dawit Habtemariam*

TRIPACTIONS

Tech-forward TMC TripActions' Innovate pitch focused on its agent technology TravelXen, which gives agents access to a traveler's trip frequency, travel policy, contact information, booking preference data and existing reservation details. It enables agents to provide proactive support and make changes to the traveler's booking, regardless of the content source, according to TripActions VP of enterprise sales Michael Sindicich, who handled the pitch.



Michael Sindicich

Sindicich also showcased TripActions' Trust & Transparency Center, which provides TMC performance data across its client base on average time to book a trip, time to reach a live agent, average hotel savings and traveler satisfaction. He showed off TripActions' administrative dashboard, Next Generation Storefront display on the booking tool and New Distribution Capability content. Basically, the works.

TripActions counts about 3,000 customers, most of which are small and midsize enterprises. The judges commended the company for offering a strong agent and traveler experience. However, they questioned whether TripActions can keep up with its fast growth, whether it can continue to aggregate different content sources and be scalable up to the enterprise level, which has been the company's stated ambition. — *Dawit Habtemariam*

TROOPTRAVEL

Meeting destinations often are selected based on the meeting owner's personal preferences, even if that means the event might cost more than it needs to. TroopTravel aims to change that and offers a solution that uses hundreds of data points not only to select the most cost-efficient location to meet, but also can take the event's carbon footprint into consideration.



Dennis Vilovic & Leonard Cremer

Co-founders Dennis Vilovic and Leonard Cremer presented a case study of an event for 300 people from 35 locations, where 60 attendees were based in Chicago. Some people might think Chicago would be the obvious choice, but once the travelers' destinations were input into TroopTravel, the tool determined that Boston was the optimal meeting location, saving the client more than \$70,000.

Even with 50 more people staying in hotels, choosing Boston meant fewer attendees were eligible to fly business class based on the company's travel policy, thereby reducing both costs and the carbon footprint.

The judges praised TroopTravel for taking complicated factors and transforming them into a simplified "choose" experience. However, they noted some factors missing, including the big one of taking into account negotiated rates. They also recommended involving meetings procurement compliance into the product. — *Donna M. Airoidi*

US BANK

US Bank's Expense Wizard application was created with corporate travelers in mind. The product not only pushes a virtual corporate card directly into a traveler's mobile wallet, but it also keeps track of traveler expenses and builds an expense report in real time using AI technology, said US Bank's VP and product manager Laretha Hulse. It can be used for both frequent and infrequent travelers, and employees as well as candidates.



Tim Smith & Laretha Hulse

Travelers can use the mobile pay option for merchants that accept it, and for those that don't, they can add their purchase as an out-of-pocket expense. The app converts it and adds it to the report. "The manager still has compliance control and visibility into all of the spend, even if [the traveler] used their own money to pay for the expense," Hulse said. The product currently is available in the U.S. and is expected to expand to Canada next year.

Innovate judges thought the focus on virtual cards and the mobile wallet was headed in the right direction. Targeting non-employees was also a strength. However, they were concerned that even though Expense Wizard complements the players already in expense management, it also competes on some levels, which could be a challenge for adoption. — *Donna M. Airoidi*

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United Execs Outline 2020 Plans

United Airlines at its recent Media Day in Chicago outlined its product, network and investment strategy for 2020, a year in which CEO Oscar Munoz said the goal was “changing how you feel about flying us.”

One of the announcements to generate the most buzz and questions was the carrier’s plans to install new overhead storage on 80 percent of its mainline fleet by 2023. SVP and chief customer officer Toby Enqvist said the bins will have the capacity for every passenger to store one large carry-on bag. That will speed up the boarding process, as the scarcity of space is the big driver of passengers massing around the boarding area to get on board first to avoid the “dreaded gate-checked bag,” Enqvist said. “This will put an end to needing to gate check bags.”

The new bins will begin appearing next year, he said. Despite the new space availability, United has not made any plans to change its Basic Economy policy, which does not allow those passengers to bring full-size carry-ons onboard, he said. Among the carrier’s other announcements:

Network growth: United’s growth strategy is centered on “being the leading airline for business travelers in the United States,” based on its figures that 75 percent of business travel traffic in the U.S. flies out of one of its hubs, EVP and chief commercial officer Andrew Nocella said.

Two key business routes from Newark are on tap for expansion next year, he said. In March, United will add a sixth daily flight between London and Newark, meaning the carrier will have hourly service between New York and London from 6 pm to 10 pm in addition to its 8:30 am flight. It also is boosting service between Newark and Washington Reagan to 13 daily flights on two-cabin regional jets.

Other service additions from Newark include Cape Town later this year, Curacao in December, Nice and Sicily in 2020 and additional service to Frankfurt and Amsterdam starting in March, he said.

Domestically, United will boost its premium capacity next year. It will increase domestic first class seats by 11 percent, and lie-flat seats on transcontinental flights will increase from 680 daily to 780 daily, according to Nocella.

New regional aircraft: United’s two-cabin, 50-seat Bombardier CRJ-550 aircraft began flying last month, with service out of Chicago O’Hare to Allentown, Pa.; Bentonville, Ark.; Cedar Rapids, Iowa; Cincinnati; Columbus, Ohio; Des Moines; Grand Rapids, Mich.; Greensboro, N.C.; Harrisburg, Pa.; Indianapolis; Madison, Wis.; Oklahoma City; Richmond, Va.; St. Louis; and Tulsa. More cities will be added out of Chicago, Newark and Washington Dulles in the coming weeks.

Latin America partnership plans: United is working to bring Brazilian carrier Azul into its planned joint venture with Avianca and Copa. The recently announced strategic partnership plans of Delta and Latam, which ended Latam’s planned partnership with American Airlines and will ultimately see Latam leave the Oneworld alliance, has reshaped competition in

the region, United president Scott Kirby said.

“The No. 1 and No. 2 [carriers in the region] were American and Latam, and they were together,” Kirby said. “With Copa—one of the best managed airlines in the entire world—Avianca and Azul, the four of us together can get a joint venture that gives us a shot at being number one.” United already holds a minority stake in Azul. The carriers have not yet filed for antitrust immunity with the U.S. Department of Transportation.

Tech enhancements: United is rolling out a three-dimensional virtual cabin tour of its aircraft as part of the seat selection process on its website, EVP of technology and chief digital officer Linda Jojo said. The feature already is available for its new CRJ-550 aircraft, and the carrier is working to expand it across other aircraft types as well, she said.

In addition, United is working on tech enhancements at its hub airports, including an indoor GPS network at Chicago O’Hare, with which passengers can map out step-by-step directions to their gate via United’s app. Meanwhile, Apple is working with the carrier on “design and technology” that will “transform the airport experience” out of its San Francisco hub.

Meal selection: United first class passengers on domestic flights next year will be able to select their meal choices 24 hours in advance, Enqvist said.

In addition, United is working to add more plant-based, healthier options to its menus. Meanwhile, flight attendants are moving to a digital method of recording passenger meal choices, which will give the carrier more data on what’s popular among passengers and which items need to be phased out.

Clear expansion: Expedited security program Clear has opened lanes at Houston’s George Bush Intercontinental Airport’s terminals B and E as well as at Newark’s Terminal C, which means it is available at six of United’s seven mainland U.S. hubs, VP of loyalty and head of MileagePlus Luc Bondar said. Clear lanes at O’Hare as well as Houston’s Terminal C are coming “very soon,” he said.

MileagePlus partners: United already is a partner of Marriott’s Bonvoy rewards program, with status matching available. On Nov. 1, United began testing a luggage delivery service on its flights from Newark to London with Marriott, in which Polaris passengers can drop their baggage off after clearing customs and immigration in Heathrow and have them delivered directly to their hotel room at five Marriott hotels in the city: JW Marriott Grosvenor House London, London Marriott Hotel Canary Wharf, London Marriott Hotel County Hall, Sheraton Grand London Park Lane and St. Pancras Renaissance Hotel London. Based on its success, United will be looking to expand the program to other markets, Bondar said.

In addition, United has forged a new partnership with jet lag management app Timeshifter, in which MileagePlus members can get free or discounted membership to the app.

Eco-fuel investment: United has pledged \$40 million toward an investment vehicle “dedicated to revolutionary technology, entities, individuals and companies trying to create alternative sources of fuel,” United president Scott Kirby said. The investment is on top of an agreement earlier this year for United to buy up to 10 million gallons of sustainable aviation fuel over the next two years.

United’s 2020 Highlights:

- Redesigned overhead bins will reduce queuing and avoid the dreaded gate-checked bag.
- Newark to London gets a sixth daily flight; Newark to Washington Reagan increases to 13 daily flights on two-cabin regional jets.
- Advance meal selection in first class; expanded menu offerings to include healthier fare
- Expanded access to Clear security program in Houston, Newark and Chicago hubs.



American, Southwest Push Back Max's Return to March

American Airlines and Southwest Airlines have extended cancellations on Boeing Max 737 aircraft through early March. American now expects commercial service on the Max will begin on March 5, a delay of its earlier projection of Jan. 16. American said about 140 flights per day will be canceled through March 4, which also will include some flights not booked on Max aircraft, as some aircraft will be shifted to cover Max-scheduled routes. The carrier said it plans to run "exhibition flights" and flights only for American employees and invited guests on Max aircraft before March 5. It then will "gradually phase the Max into our operation" over the month of March.

Southwest, meanwhile, said it would remove the Max from its schedule through March 6 "based on continued uncertainty" of the timing of its return to service. It previously had been removed through Feb. 8. The removal of the Max cuts about 175 weekday flights of Southwest's peak daily 4,000 flights.

Boeing on Nov. 11 said it projects the Max's return to commercial service will begin in January and that deliveries of the aircraft to airlines would resume in December, pending an airworthiness directive from the Federal Aviation Administration.

JetBlue & Norwegian Air Agree to Interline

JetBlue and Norwegian Air have signed a letter of intent to interline. Travelers will be able to combine connecting flights across the two carriers when booking on their respective websites and global distribution systems by summer 2020.

The partnership will connect JetBlue flights to Norwegian's 20 nonstop transatlantic routes out of Boston; Fort Lauderdale, Fla.; and New York's John F. Kennedy International airports.

"The partnership will provide travelers throughout the U.S., Caribbean and Latin America with more affordable fares to Europe and vice versa, and ... it will offer seamless connections with two of the most awarded low-cost airlines in the world," according to Norwegian CFO and acting CEO Geir Karlsen. ■

Accor Co-working Brand Wojo Will Expand Beyond France

While WeWork faces stumbling blocks, Accor is doubling down on its partnership in co-working brand Wojo, which will expand beyond France by opening a Wojo Site in Barcelona. It will be the sole tenant of the new Sancho de Avila 65 office building in Barcelona's 22@ business district, which houses companies like Amazon, eBay and Facebook. The anticipated opening date of the facility is the second quarter of 2020.

The Barcelona location will feature workstations, meeting rooms, a concierge service and activities to encourage interaction with others working there. A terrace on the sixth floor will offer a view of the Sagrada Familia basilica and the Mediterranean Sea. "Our ambition is to be the leading player in 'workspitality' by developing all over the world a large network of places; to create unique work experiences with a full range of services, designed to be pleasant; to encourage performance; and to bring talents together," said Wojo CEO Stephane Bensimon.

Hotels and co-working are natural part-

ners, and many hotel properties now include co-working spaces on-site. Such locations are particularly attractive to younger business travelers, Global Business Travel Association director of research Jessica Collison told The New York Times in a January 2019 article.

A 50/50 joint venture between Accor and real estate company Bouygues Immobilier created Wojo in 2015. Accor plans to make Wojo the largest co-working brand in Europe by 2022 by opening 1,200 spaces. Those will add to the more than 100 existing Wojo Spots and Wojo Corners, mostly located in Accor hotels, and the 10 existing Wojo Sites. Wojo Spots offer Wi-Fi in hotel lobbies, restaurants and bars. Wojo Corners are dedicated co-working spaces designed for uninterrupted work and sheltered from public areas. Wojo Sites are standalone spaces in dedicated buildings, combining communal zones like bars, lounges and kitchens with shared spaces, meeting rooms and dedicated offices. Ten Wojo Sites are open in Paris, the Ile-de-France region and Lyon. ■

Furnished Apartment Brands Gaining Traction

The short-term serviced-apartment segment continues to show strength. Blueground, which operates 2,800 apartments in nine cities globally, received \$50 million in Series B funding last month, increasing its total equity funding to \$78 million. WestCap Investment Partners and Prime Ventures co-led the round. WestCap founding partner Laurence Tosi is former CFO of Airbnb and of private equity firm Blackstone. Fifty percent of Blueground's business comes from clients either relocating for work or moving for one to six months for projects, a Blueground spokesperson said. The company plans to expand to London, Paris and Seattle by the end of this year and aims for 50 locations by 2023.

Meanwhile, Blueground competitor Zeus Living expanded to New York City this month. The San Francisco-based company launched in 2015 and has been operating 1,600 apartments in the Bay Area, Los Angeles, Seattle, and Washington, D.C. It now offers units in Manhattan, Long Island City in Queens and Hoboken and Jersey City in New Jersey.

Zeus CEO Kulveer Taggar told BTN the average stay is between two and three months. "It's about 50 percent individual owners and 50 percent larger owners, and about 50 percent single-family condos and homes

and 50 percent in larger buildings." In D.C., Zeus manages an entire new, 47-unit property near Dupont Circle. The owners like the fact that "we aren't a short-term rental company so there is less wear and tear on the building."

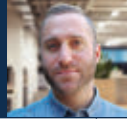
While Zeus does have a corporate sales team and sells directly to businesses, the company typically works with larger companies' mobility teams or relocation management companies, and guests are often interns or working on long-term projects. Clients have included Disney, Uber, Deloitte and Genentech.

Taggar sees opportunity for furnished apartment product beyond extended-stay hotels and traditional corporate housing. Those can be "cookie cutter," he said. "If com-

"Whenever we've done price comparisons, we're 40 percent more affordable."

—ZEUS' KULVEER TAGGAR

paring to traditional corporate housing, whenever we've done price comparisons, we are about 40 percent more affordable. For example, a one-bedroom in Oakwood is about \$10,000 per month in summer, and a one-bedroom on Zeus in San Francisco in the summer is \$5,000 to \$6,000 per month. In the Bay Area, I've had customers tell me they can pay \$800 per night for hotels. When Salesforce has a conference, sometimes it's cheaper to rent a Zeus unit for a month than pay a hotel for seven days." ■



UATP Will Allow Travel Management Companies to Issue Its Cards

BY AMANDA METCALF

A decade after the idea surfaced, payment network UATP will allow travel management companies to issue UATP payment accounts. BCD Travel is the first. It will launch with a U.S. test group internally and then roll out to all U.S. clients, possibly next quarter.

In typical payment networks like Visa, Mastercard and American Express, banks are the ones to issue payment cards. In the proprietary, airline-owned UATP network, airlines until now have been the only parties to issue its centralized lodge accounts. "It's a very progressive move by the UATP board because traditionally, there was sort of that love-hate relationship between airlines and GDS, airlines and TMCs, and so here you've got a case where the airlines are allowing access to the UATP network ... for entities that are not airlines," said president and CEO Ralph Kaiser.

There are benefits for airlines in the closed model. For airlines that are both the merchant and the UATP account issuer on the same transaction, the transaction is free. Delta, as an example, would pay no transaction fee for the purchase of a Delta ticket paid for with a Delta-issued UATP account.

Additionally, airline issuers can receive commissions on the interchange fees that merchants pay account issuers. If a passenger used an American Airlines-issued UATP account to buy a United flight, for example, American, as the account issuer, could receive commission on the interchange fee paid by United, the merchant. UATP merchants include most of the world's airlines, many rail carriers, 12,000 Airlines Reporting Corp. travel agency locations and 130,000 other travel agency locations, according to UATP.

Among benefits to TMCs and their clients, according to Kaiser: UATP billing statements include Level 3 transaction data like airline, city pair and class of service that can flow to TMCs' corporate customers. TMCs also now are in a position to gain some interchange-fee commissions.

"The airlines need to accept more lower-cost forms of payment. If we can have a distributor like a TMC put more accounts in the network ... that's a good thing."

— UATP CEO RALPH KAISER

UATP, meanwhile, still gets a revenue share, Kaiser said, to cover costs for the airline owners.

"The fact that a TMC is engaging in issuing the cards is not surprising, given that they want to be the one-stop solution [and] have tighter control/audit/reporting on the payment process," said Get Travel Solutions founder Karoline Mayr. "And it is a very nice new revenue stream that conveniently is entering at the time of distribution disruption. ... Payments is a great revenue stream, working like a licensee deal where they make money off of every transaction; it appears like a small amount off each transaction, but as you look at the total number of transactions, you no longer feel like it is small."

The downside for airlines: With more issuers in the UATP arena, fewer of those "free" transactions will occur in which the airline issuer and the airline merchant are the same entity. Kaiser noted, however, "The more UATP accounts available for airlines to accept, the less they'll pay in merchant fees." That's because UATP's merchant fees are lower than other payment networks' transaction costs, generally by about 1 percent, according to Kaiser.

If TMCs can funnel significantly more airline transactions to UATP accounts, the relationships between TMCs and airlines also could thaw a bit, and mega TMCs like BCD are the best-positioned to make a noticeable difference.

"This probably came up over a decade ago and there was not a lot of interest within the airline industry, but more recently, we brought it up again because things evolve, markets modernize, so we thought it would be a good time to consider it," Kaiser said. "The airlines need to accept more lower-cost forms of payment, and so, if we can have a distributor like a TMC put more accounts in the network ... that's a good thing, and I think the airline industry finally realized that opening up the network to other entities could actually be a net benefit instead of worrying about, 'Oh, are we giving a benefit to a TMC? We don't like to do that.'"

According to a press release from BCD and UATP, BCD corporate clients' traveler profiles will signal BCD to use BCD-issued UATP accounts when booking with relevant merchants. Also according to the release, "BCD will help manage their clients' UATP program and provide customer service."

Kaiser said UATP is open to speak with other U.S.-based TMCs about the TMC issuer program, and he expects to announce more TMC participants before the end of the year. ■

APAC Firms & Midsize Travel Buyers Show Biggest Interest in Virtual Cards

Companies around the world are willing to explore virtual cards for travel payments. Midsize programs and those based in Asia/Pacific are leading the charge, according to an Association of Corporate Travel Executives and Mastercard survey of 290 corporate travel managers across North

America, Latin America, Europe and Asia/Pacific.

Just 15 percent of companies used virtual cards for corporate travel, trailing physical corporate cards at 67 percent, personal cards at 48 percent, and lodge cards at 38 percent. However, 28 percent were likely to adopt vir-

tual cards in the future, citing factors like security, spend control and the need to address candidate and client travel.

Of respondents that don't use virtual cards, 56 percent of those based in Asia/Pacific were likely to adopt virtual cards. Europe ranked second with 48 percent, followed by North American respondents at 38 percent.

Meanwhile, organizations spending between \$5.1 million and \$15 million annually on travel showed the most enthusiasm. Twenty-nine percent of those respondents use virtual cards, and another 22 percent are likely to adopt them, the study found. ■

Amex Opens Corporate Cards to Startups & Rolls Out New Travel Rewards

Amex is opening its corporate card line to startups typically considered too small for corporate programs but too large and well-capitalized for small business card programs, said American Express Global Commercial Services president Anna Marrs. “Startups are an increasingly large part of the global economy, but traditional corporate card products weren’t meeting their needs,” she said. “From working with startups in the past, we realized that was an underserved opportunity.”

Such companies often have plenty of financial backing but haven’t been around long enough to provide the financial history most traditional corporate card programs demand, Marrs said. Instead, Amex will use alternative sources of data to evaluate and mitigate risk when serving startups. “These companies are growing fast, and their spending capacity needs to grow, as well,” she noted.

Startups selected can access all the features of the Amex corporate card program, as well as merchant offers designed specifically for small and early-stage businesses.

Corporate Card Revamps

American Express has revamped its entire line of corporate credit cards, adding travel-related rewards in response to procurement manager and travel buyer demand for an improved travel experience.

The new benefits include:

- Uber Rewards: Beginning in December, Amex corpo-

“Our corporate customers are focusing on the employee travel experience... so we wanted to make sure we have a product that had high Net Promoter Scores from employees.”

—AMERICAN EXPRESS’
ANNA MARRS

rate cardholders will earn double Uber Rewards points for rides booked through their Uber for Business profiles and paid for with their Amex corporate cards. Uber Rewards include discounts on personal rides and Uber Eats orders. Corporate Platinum and Gold cardholders also will have access to priority pickups at most U.S. airports, and Platinum cardholders can request to ride with highly rated drivers where available.

- Clear: Beginning in November, Platinum cardholders get \$179 in statement credits toward Clear membership, which will pay for one year.
- Hilton Honors: Platinum cardholders will receive complimentary Hilton Honors Gold status, providing access to upgrades and a higher earning rate for points. Corporate Gold and Green cardholders will receive complimentary Hilton Honors Silver status. The enhanced Hilton rewards kick in this month.

The new line of corporate cards offers higher credits for airline ancillaries like baggage fees and Wi-Fi, and Amex client companies will gain more flexibility in tailoring their membership rewards programs. An updated companion app and redesigned cards also are on the way.

Marrs said the upgraded rewards reflect corporates’ increased emphasis on making travel easier. “Our corporate customers are focusing on the employee travel experience as much as costs and spending now, so we wanted to make sure we have a product that had high Net Promoter Scores from employees,” Marrs said. She added that some companies now evaluate chief procurement officers and other managers on such scores.

According to Marrs, the new rewards also reflect the blurring line between corporate and personal travel. Cardholders increasingly expect to apply points earned on their corporate cards to personal travel, she said. Additionally, Amex continues to enable corporate clients to link Membership Rewards earned on corporate card spend to cardholders’ personal accounts. ■

Kayak Enters Corporate Travel Sector with Launch of Free Solution

BY MITRA SORRELLS

Fifteen years after its launch as one of the first consumer travel metasearch solutions, Kayak is expanding into corporate travel with the launch of Kayak for Business.

Companies can request to join a waitlist; Kayak will choose a few to use the product in pre-beta, with the full beta launching publicly this month.

The free tool will function as a meta-engine, showing employees comprehensive options for flights and hotels, with car rentals to be added in the future.

Corporate clients load their travel policies and preferred approval flow into the system, so as employees search they can see which options fall within that policy.

Kayak said it expects the system to appeal to small- and midsize businesses and startups. But unlike other travel management solutions targeted to this sector, such as Lola, TravelPerk, TripActions and TravelBank, Kayak initially will not offer support from human agents.

“This is a big reason that our service is free. Our users can rely on existing customer service options, including supplier direct, online travel agencies or even their corporate travel agency if they have one. In the future, we plan to add ways for travelers to opt-in for concierge-level or partner-specific customer service when they need it,” the company said in an email.

Kayak said more details about the concierge services will be released later this month, but it did not respond to a question of whether the platform provides tools related to duty of care.

The company said the idea for Kayak for Business developed out of its own internal needs to manage its employee travel.

The past year has seen a flurry of activity in corporate travel. Lola partnered with American Express Global Business Travel in November 2018 and in March raised \$37 million. TravelPerk completed a \$104 million Series C round in July, and TripActions banked \$250 million in June.

Companies in this space have also regularly been adding new product features to entice clients—most recently TravelBank, which launched a three-in-one “SuperItinerary” tool in September.

According to Phocuswright’s U.S. Corporate Travel Report 2018-2022, managed travel represents a third of the total travel market in the United States and will reach \$138 billion by 2022, with 86 percent of that spending taking place online. ■

Article originally published by Phocuswire, which is also owned by Northstar Travel Group.



CONTINUED FROM FRONT PAGE

NDC Kaleidoscope

the booking experience for our customers.”

CWT trialed the platform as well, announcing its first successful live NDC booking through Selling Platform Connect with a ticket issued on American Airlines. According to Amadeus, NDC capability through the platform is currently limited to “several key partners” in its NDC-X program. The platform will deploy to other TMCs in the coming months.

American Express GBT announced in late October it is piloting NDC connections to Amadeus and Sabre in the latest version of its Neo online booking tool. GBT claimed it was the first TMC to have such connections with traditional distribution partners. It is connecting the content from the GDS to the booking tool via the Amex GBT supply management platform. GBT is working on similarly integrating with Travelport.

Neo also is ingesting content from ATPCO’s Routehappy and showing product information like seat pitch, Wi-Fi availability and food options. GBT is working to integrate its supplier management platform with its other online booking tool partners to provide NDC and Routehappy content.

“As a standard, NDC will only work if it can help us deliver on this promise at scale to provide real value to companies and business travelers,” according to Amex GBT director of content distribution John Bukowski. “We are focused on delivering an enhanced user experience while working with customers to ensure they continue to have control of their programs.”

In August, Amex GBT began processing live bookings for American Airlines using NDC standards via Amadeus Travel’s NDC-X application program interface. American managing director of strategic account sales Hank Benedetti hailed the achievement at the time as “the first triumvirate to make it across the finish line” with GDS-enabled NDC. Since then, GBT has also made test bookings with both Sabre and Travelport.

Egencia Works Through Aggregator, But Plans Future Direct Connect

On Nov. 1, Egencia launched Lufthansa Group NDC content in Austria, Belgium, Denmark, France, Germany, the Netherlands, Norway, Sweden, Switzerland and the UK. Clients in these countries can book NDC rates, including Economy Light Fares not available in the GDS, from the flagship Lufthansa carrier as well as Austrian Airlines and SWISS Airline. Aggregator TravelFusion enabled the content for Egencia.

While the bookings will not incur Lufthansa’s 16-euro distribution cost charge, Egencia clients will incur an “air booking-nonstandard” fee for each booking. Egencia would not disclose the amount, but director of global transportation supply Mohit Chandiramani confirmed it would be less than the DCC and “in line with the market.”

According to Egencia, the Lufthansa integrations will display NDC and non-NDC content side by side and allow customers to mix both types of fares within a single booking. The company trained more than 1,000 agents to use Lufthansa’s agent tool to support these bookings.



“We are focused on delivering an enhanced user experience while working with customers to ensure they continue to have control of their programs.”

—GBT’S JOHN BUKOWSKI

BTN senior transportation editor Michael B. Baker & staff writer Dawit Habtemariam contributed reporting for this story.

Though Egencia is leveraging TravelFusion for now, that’s not the long-term plan. Expedia Group, the parent company of Egencia, currently is testing a direct connect with Lufthansa to ensure it delivers on scalability and customer experience. When ready, Egencia will integrate it into its platform.

“Our strategy is to leverage Expedia Group’s technology first, which sources NDC content directly from the airline,” said Egencia product management VP Arvind Prakash, but added that the company would continue to explore all avenues for NDC content. An Egencia spokesperson was unable to give a timeline on direct connect developments.

Egencia also said it will launch NDC content for British Airways later this month.

TripActions Connects Directly to Lufthansa Group & Southwest

TripActions, on the other hand, has established an NDC-enabled direct connection to Lufthansa Group and aims to have content available to all platform users by the end of this month.

At the onset, the connection will be “starting with the basics,” TripActions VP of booking experience and supplier strategy Daniel Finkel said. It will eliminate the Lufthansa DCC for TripActions users and give TripActions access to all Lufthansa Group content, including Economy Light Fares. The initial stage also will deliver some ancillaries like premium seats, Finkel said. Ultimately, TripActions aims to create dynamic, bundled offers through the connection for a “robust, enhanced, enriched experience,” he added.

More central to TripActions’ current client base, TripActions and Southwest Airlines have established a direct connect via ATPCO’s NDC Exchange. In addition to bookings, the connection enables travelers to change reservations through the platform, buy EarlyBird Check-In and automatically apply unused credits automatically.

TripActions did its first NDC implementation earlier this year with United, enabling content like Wi-Fi, premium seating and United Club access either as individual items or part of bundled fares. The company reported “massive traction” from that implementation.

Finkel emphasized NDC bookings will not incur a higher per-trip fee: “We have a democratic stance on content in general. There are others who charge differentiated prices based on the source of the content, but that is not our philosophy at all.” TripActions charges a flat service fee per trip.

Serko & Qantas Direct Connect

While Lufthansa and BA have shuffled the distribution deck in Western Europe, Qantas has worked similar disruption in Australia and New Zealand. These are major carriers in both regions; as a result their regional moves have global consequences for travel managers.

Serko’s Zeno travel management tool, also a major player in Australia and New Zealand, now provides end-to-end NDC booking capability through the Qantas Distribution Platform. The connection delivers Qantas fares in Zeno through either GDS connections or through the direct Qantas platform. The fares appear through a user interface via integration with travel management company mid-office system Tramada. Tramada country manager for Australia and New Zealand Susan Enners said the integration “will bring NDC bookings to life for the majority of Australian and New Zealand TMCs.”



Turkish Airlines Aims to Leverage Corporate Travel Growth from New Airport Hub

BY MICHAEL B. BAKER

In Turkish Airlines' "great move" this year from its longtime base at Istanbul Ataturk Airport to the new Istanbul Airport, the carrier moved 47,000 tons of equipment and 337 planes within 33 hours. At the carrier's recent Corporate Club Conference in Istanbul, chairman Ilker Ayci referenced Hannibal's crossing of the Alps. "If you compare our big move, it was larger than that."

Ataturk is largely closed with the exception of some cargo and private aviation traffic, and the new airport that Turkish Airlines now calls home is the world's largest terminal under a single roof, boasting a capacity of 90 million passengers per year. Over the next several years, expansion and new runways will grow that potential capacity to 200 million passengers per year. Istanbul Airport chief planning officer Ismail Polat said that projected growth brought to mind another historical military leader, Napoleon Bonaparte, who was quoted as saying Istanbul would be the capital if the world was a single country.

For Turkish Airlines, the airport unlocks growth potential. Turkish Airlines' network consists of 266 international destinations, including 12 gateway cities, and 50 domestic locations. The carrier plans to build that further with as many as 30 new Boeing 787-9 Dreamliner aircraft set to join its fleet over the next four years.

By 2023, the carrier aims to have an annual 120 million passengers, compared with more than 75 million last year, which was an increase of 9.5 percent compared with 2017. About a third of those were transit passengers connecting in Istanbul. "We have already increased our total destinations and frequencies after moving to the new airport," according to Turkish Airlines SVP of corporate



Turkish Airlines chairman Ilker Ayci (right) takes questions from the BBC's Aaron Heslehurst (left) during the carrier's Corporate Club conference in Istanbul.

marketing and distribution channels Mert Dorman.

"With the advent of new kinds of aircraft, we are currently utilizing lots of the advantages, such as better connection times. Also, with extra space provided to lounges [in the new airport,] we have the chance to provide more comfortable zones to our Corporate Club members."

The grounding of the Boeing 737 Max aircraft has affected 24 of Turkish's aircraft, denting capacity, but even so, passenger growth has continued this year, Ayci said. As the carrier has grown, so has its focus on small and midsize enterprise accounts, Dorman said. "Earlier, most of the focus was on bigger clients who would bring a revenue that would be the sum of many SMEs," Dorman said. "However, after the technological improvements that have increased the productivity in terms of account management, each sector started focusing more on SMEs to create extra revenue."

The SME focus includes Turkish's Smart program, which offers corporate members discounts as high as 10 percent, as well as extra baggage allowances and membership in the Corporate Club corporate loyalty program. "Even though they are small in terms of the number of single company flights, it shows a different story when the whole segment is considered," Dorman said.

The airline also will focus on distribution next year, Dorman said. It plans to introduce to the market in the third quarter of 2020 a distribution channel that complies with Level 4 New Distribution Capability standards. ■

IAG Inks Agreement to Buy Air Europa

BY MICHAEL B. BAKER

International Airlines Group has signed an agreement to acquire Spanish carrier Air Europa for 1 billion euros, with which the group plans to build Madrid into a "true rival to Europe's four largest hubs."

Pending regulatory approval, IAG expects to complete the acquisition in the second half of 2020. It initially plans to run Air Europa—which flies to 69 destinations, both within Europe and in Latin America, the Caribbean, the United States and North Africa—under its current brand while managed by Iberia CEO Luis Gallego. Over time, it would integrate Air Europa

into Iberia's hub structure in Madrid and onto IAG's service platforms. IAG also will integrate Air Europa into its joint businesses and loyalty program.

In addition, Air Europa will leave SkyTeam under IAG's integration plans, according to its presentation to investors.

"This is of strategic importance for the Madrid hub, which in recent years has lagged behind other European hubs," according to Gallego. "Following this agreement, Madrid will be able to compete with other European hubs on equal terms with

a better position on Europe to Latin America routes and the possibility to become a gateway between Asia and Latin America."

Ryanair CEO Michael O'Leary, meanwhile, already has said he plans to ask regulators to force divestments as a part of the acquisition, according to Reuters. He told analysts that it was "a bad deal from a competition point of view" and a "merger to monopoly in Madrid."

IAG was formed in 2011 from the merger of Iberia and British Airways, and it also owns Spanish low-cost carrier Vueling. Its most recent acquisition was Aer Lingus in 2015. ■



American Moves Sales Under Revenue Leadership

BY MICHAEL B. BAKER

American Airlines is reorganizing its commercial and operations structure, including moving its global sales team directly under the carrier's revenue umbrella.

SVP of customer experience Kerry Philipovitch announced she would retire at the end of the year. In light of her coming departure, American has aligned its commercial and operational teams under four divisions—revenue, operations, network strategy and customer experience—all reporting to American Airlines president Robert Isom.

SVP of global sales and distribution Alison Taylor now reports to SVP of revenue and head of the revenue division Don Casey. The move positions Taylor alongside VP of revenue management Jim Fox and will “facilitate improved long-term customer partnerships and agility in responding to the ever-changing market needs of American's customers,” according to the carrier.

American said the structure also will enable it to get revenue initiatives to market more quickly, such as recent work around New Distribution Capability like its testing of corporate bundles with travel management partners.

Since former SVP for network, planning, alliances and sales Andrew Nocella left American to join United in 2017, Taylor had reported to SVP of customer experience Kurt Stache. Stache now leads the customer experience division, which includes flight service, customer care, global marketing, customer loyalty and digital customer experience.

SVP of operations David Seymour leads the operations division, and American has switched Devon May from SVP of network strategy to SVP of American Eagle and operations planning. He will lead regional and mainline operations planning teams. Jim

How American's New Organizational Structure Impacts Corporate Sales

- Sales has moved under the revenue umbrella to facilitate “improved long-term customer partnerships.”
- SVP of global sales and distribution Alison Taylor now reports to SVP of revenue Don Casey.
- Taylor also becomes part of a new leadership team that meets regularly with president Robert Isom.

Butler, who has led American's international airport operations and cargo teams, now also will lead American's domestic airports as SVP of airport operations and cargo, a new role that will report to Seymour.

The network strategy team is now under Vasu Raja, whom American promoted to SVP of network strategy. In addition to his current role overseeing the carrier's global network, he also will oversee alliances and partnerships.

In a letter to American employees, Isom said the structure is designed to improve coordination across operations functions. “The most important thing we can do to ... deliver a world-class customer experience is run a safe and reliable operation,” Isom wrote. “We haven't been consistently hitting the mark, and that's not fair to our team or our customers. There are several reasons why that's been the case, but it's our job to find a way past temporary difficulties and make American better every day.”

In addition, the structure includes an operations and commercial leadership team that will be a part of Isom's staff meetings and “bring the necessary visibility and accountability to the efforts and initiatives needed to excel,” according to Isom. Taylor, May and the four division leaders form the team. ■

Sabre, DOJ Bound for Trial in January, But First a Try at Mediation

BY JAY BOEHMER

The U.S. Department of Justice's lawsuit to block Sabre's acquisition of Farelogix is slated to go to trial the week of Jan. 27, 2020, according to a scheduling order from the U.S. District Court for the District of Delaware.

The Beat

The trial comes a little later than Sabre had proposed, as it had asked for trial to begin in December of this year. Yet, the date comes sooner than DOJ had suggested. The plaintiff initially eyed March 2020, according to court filings.

DOJ filed suit on Aug. 20, claiming that Sabre's proposed acquisition of Farelogix is “a dominant firm's attempt to eliminate a disruptive competitor after years of trying to stamp it out.”

Sabre countered that its market position is not “dominant,” as it is one of three major global distri-

bution systems around the world—and not even the largest. That distinction goes to Amadeus.

Sabre also argued that Farelogix is a relatively small player in a large and competitive field of New Distribution Capability retailing and connectivity. Further, Sabre's acquisition is premised on scaling Farelogix's technology to keep competitive pace with Amadeus “by combining Farelogix's NDC and retailing capabilities with Sabre's travel agent network and global footprint.”

In short, Sabre insists it “is buying Farelogix to build an integrated NDC-based, end-to-end platform for retailing, distribution and fulfillment capabilities, not to kill it,” the company stated in an answer to DOJ's complaint last month.

DOJ seeks to block the transaction. Sabre, meanwhile, hopes to consummate its Farelogix buy as soon as possible, with no strings attached.

While these opening positions seem irreconcilable, the case has been referred to mediation, where a magistrate judge will hope to foster an out-of-court settlement between the two. A mediation conference is scheduled for the first week in December.

In the meantime, each side is building its case. Subpoenas are flying. Depositions are scheduled. Document production is underway.

Already, DOJ, for example, has served subpoenas on a variety of travel industry players, including Sabre's two major GDS competitors, the largest U.S. carriers and several travel management companies, including CWT, Travel and Transport and TripActions. Sabre has issued subpoenas to a variety of travel players, as well, some of them overlapping with DOJ.

DOJ also has scheduled depositions with more than a dozen current and former Sabre employees, including current CEO Sean Menke. ■

Lyft Courts Corporate Biz En Route to Profitability

BY MICHAEL B. BAKER

Lyft's third quarter revenue increased 63 percent year over year to \$955.6 million, though its net loss deepened on higher compensation and insurance costs.

During the quarter, the number of active riders was up 28 percent year over year to 22.3 million, and the revenue per active rider was up 27 percent to \$42.82, Lyft reported. The company expects similar levels of growth for the full year 2019.

Growing corporate business relationships, which co-founder and president John Zimmer in an earnings call identified as a "\$25 billion addressable opportunity," should be a larger driver of future revenue growth. An integration with Concur during the third quarter, in which rides are fed directly into the Concur expense reporting platform, has been one such driver, he said.

"In just the first month, we have seen significant adoptions by companies, with more than 200,000 employees now enabled to use this feature," Zimmer said. "Partners are happy to see this integration, and our sales cycle has been much faster now that we offer it."

In addition, Lyft has been making platform tweaks to increase ridership, co-founder and CEO Logan Green said. A redesign in recent weeks made all the various available transportation modes—standard rides, shared rides, bikes and scooters, for example—more visible.

**Corporate travel:
"A \$25 billion
addressable
opportunity."**

—LYFT'S JOHN ZIMMER

Another feature, Fast Match, has set up distinct Lyft pickup areas at five airports, including recent additions Los Angeles and San Diego, away from the busier general pickup areas, which decreases wait times, he said.

"This early success is particularly encouraging, as airport riders tend to be higher value for our business," Green said. "We'll be launching in New Orleans in November and are in active discussions to expand this to more airports around the country."

Lyft reported a \$463.4 million loss in the third quarter, compared with a \$249.2 million loss in the third quarter of 2018. That loss includes \$246.1 million in stock-based compensation and payroll taxes related to that as well as \$86.6 million related to changes in insurance regulations. Total costs and expenses were up 69.4 percent to \$1.4 billion, including a nearly 274 percent increase year over year in research and development costs.

Lyft earlier this year projected that 2019 would be its peak loss year, and Green said the company is on a path to have positive earnings by the fourth quarter of 2021. ■

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Rocketrip was founded in 2013 and is based in New York City.

www.rocketrip.com



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www.sabretravelnetwork.com



Serko

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Southwest Business

Southwest Business: New Name, Same Heart

Southwest Airlines Corporate Travel is now Southwest Business! Southwest Business is designed around taking the work out of work travel by making it easier to do business with Southwest Airlines. As Southwest Business evolves, we recently announced a new agreement to bring industry-standard processes to the Travelport and Amadeus GDS channels including allowing travel managers the ability to book, change, cancel, and modify reservations. Southwest is also partnering with ARC to implement industry-standard processes to handle the reporting and settlement of tickets booked through Travelport and Amadeus channels. To complement these additions to its travel solutions portfolio, Southwest recently added a partnership with ATPCO/SITA to refresh product connections via a dedicated, direct-connect channel, and offer its award-winning Hospitality to more corporate travelers. Southwest Business also continues investing and enhancing its online booking tool, SWABIZ®. With recent upgrades, the site has become a one-stop shopping experience with air, car, and hotel booking functions.

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www.southwest.com/aboutbusiness.



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www.travelandtransport.com



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www.travelleaderscorporate.com



Traxo

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Stop relying on employees to manually enter data or forward in confirmation emails, and eliminate the hassle and brain damage of reconciling credit card files, expense reports, and TMC data. Win back your time – and your sanity – with Traxo CONNECT.

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We believe being there in person is powerful. Fast becoming the default for corporate travel, TripActions is the modern business travel platform that combines AI-driven personalization with unrivaled inventory choice and proactive global 24x7 365 live human support to delight employees, finance leaders, and travel managers alike—all while empowering organizations to seize travel as a strategic lever for culture and growth. Delivered within a powerful, easy-to-use mobile-first interface, TripActions helps more than 2,000 customers reduce average booking time from 60 minutes down to six while achieving an unprecedented 93% traveler satisfaction and up to 34% savings on lodging alone.

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TRIPBAM is the leading technology provider for reducing hotel costs and optimizing hotel programs. Using our patent-pending automated shopping processes, advanced analytics and benchmarking, companies can save up to 20% on their hotel spend, all in a customizable way to accommodate all corporate cultures.

Here’s how it works:

- TRIPBAM’s patent-pending Daily Hotel Rate Shopping and Rebooking technology helps you optimize your bookings and guarantee travelers are getting the best rates.
- Our Analytics and Benchmarking suite with real-time reporting provides comprehensive data to monitor and audit preferred hotels’ performance and drive better hotel supplier agreements.
- By Utilizing Smart Share Shift (S3), companies can shift share to preferred hotels and away from hotels that are not performing as expected.
- Rate Auditing: track negotiated rate availability real-time by hotel and notify the hotel if a negotiated rate is not offered, but the room/bed type is available. Using this system, companies improve rate availability from an industry average of 60% to over 85%.
- Using Dynamic Sourcing, companies identify markets that would benefit most by having more preferred hotels in place and easily replace hotels that aren’t performing as expected.

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BUSINESS TRAVEL INNOVATION FACEOFF PRESENTERS

Continued on next page

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www.bizly.com



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At 30SecondsToFly we have built Claire, an A.I. software to revolutionize the traveler experience and to optimize call center operations. With fast and automated chat booking flows we put a smile on the traveler's face. Our deep neural network learns their habits and preferences and provides them with a personalised experience, even when there is no travel consultant involved. Travel agents, on the other hand, can focus on the most important tasks because many of their repetitive workflows are automated. Last but not least, agencies have a solution at hand that allows them to scale up and down easily, increasing revenues and decreasing operational costs.

www.30secondstofly.com



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With three major technology platforms, we drive critical business outcomes across routine and complex data challenges for travel companies. We maintain a network of the most connected travel information resources and transactional services to serve our customers. We develop and implement technology solutions for our customers in the areas of Data Services, Workflow Automation, and Reporting and Analytics. We support all of our technology with Advisory Services and Governance and Security.

www.ciswired.com



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HRS delivers purpose-built solutions to optimize the interaction between hotels, corporate travel buyers, and business travelers at every step of the travel journey. HRS empowers procurement and travel management professionals to take control of the lodging category and provides business travelers with greater choice and more efficient processes to improve their hotel experiences pre-, during, and post-trip. The company serves as a trusted partner to more than 3,000 multinational corporations around the world, including Google, Siemens, Alibaba, China Mobile, and Volkswagen. Founded in Cologne in 1972, HRS today has more than 1,500 employees in 35 offices worldwide.

www.hrs.com/corporate



BUSINESS TRAVEL INNOVATION FACEOFF PRESENTERS



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www.ninaandpinta.com

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www.tripactions.com

TripActions

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Pana is the leading all-in-one platform for coordinating non-employee and guest travel. We combine real humans with modern technology to deliver a seamless travel experience for this underserved category of traveler, which includes on-site interviews, speakers, partners, contractors, interns, doctors, and patients. In less than 30 seconds, trip organizers send details to Pana and they are done. We handle the rest! Pana arranges everything from pre-paid (and fully-reconciled!) flights and hotels, to day-of-travel logistics, to reimbursing guests for meals and incidentals. And our support team—backed by technology—is available 24/7 with 5-minute response times, so the traveler always feels taken care of.

www.pana.com



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- Using Dynamic Sourcing, companies identify markets that would benefit most by having more preferred hotels in place and easily replace hotels that aren't performing as expected.

www.tripbam.com



PredictX

PredictX is the single source for deeper analytics and enhanced decision-making in managed travel. Our advanced analytics platform gives travel buyers the power and independence to make improved sourcing and policy decisions.

We use groundbreaking technology like machine learning to combine data sources including TMC, Card, Expense, Corporate Hierarchy, Supplier and Meetings data. Our analytics platform provides travel-related data on demand at an executive summary and category manager level while simultaneously allowing drill downs to supplier, department, trip and detailed transactions.

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Our years of experience delivering total trip cost metrics to large spend travel programs with complex data challenges places us as a leader in technology and data analytics in the managed travel sphere.

www.predictx.com



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BTN

BUSINESS TRAVEL NEWS

CORPORATE TRAVEL INDEX CALCULATOR

BTN's free online tool customizes our Corporate Travel Index data for your travel program. Now includes quarterly updates and risk scores for each city.

Presented By: **BTNGROUP**

Summary | Hotel | Car | Meal | Risk

U.S. Index | Non U.S. Index | Reset Filters

Data Partners: ADVITO | DVI | geosure | PRIME NUMBERS

Search Cities: Select all, Akron, OH, Albany, NY, Albuquerque, NM, Allentown, PA, Anaheim, CA, Atlanta, GA

Hotel Tier: Luxury, Upper-Upscale, Upscale, Midscale, Economy

Car Rental Class: Full Size, Intermediate, Compact

Meals: Breakfast, Lunch, Dinner

Select Quarter: 2018/Q4, 2019/Q1

All Cities Selected: Avg Risk Score **43** | Hotel **\$176.36** + Car Rental **\$46.97** + Meal **\$98.09** = Total Cost **\$321.41** | QoQ Change **2.99%**

City	Risk Score	Avg Hotel Cost Across Selected Tiers	Avg Car Rental Cost Across Selected Classes	Total Cost for Selected Meals	Total Daily Cost	QoQ Change
Alton, OH	46	\$140.39	\$43.21	\$86.53	\$270.13	-2.45%
Albany, NY	44	\$167.76	\$44.18	\$95.73	\$307.67	4.00%
Albuquerque, NM	37	\$127.51	\$42.48	\$86.53	\$256.52	-0.24%
Allentown, PA	34	\$145.94	\$42.54	\$89.66	\$278.14	2.58%
Anaheim, CA	31	\$215.59	\$45.91	\$103.21	\$364.71	2.36%
Atlanta, GA	55	\$198.26	\$46.96	\$106.37	\$350.98	7.69%
Austin, TX	40	\$233.58	\$43.30	\$102.12	\$379.00	6.64%
Bakersfield, CA	42	\$145.12	\$49.56	\$85.47	\$280.15	14.86%
Baltimore, MD	52	\$171.86	\$47.27	\$109.50	\$328.63	-0.21%
Baton Rouge, LA	50	\$141.03	\$59.98	\$90.91	\$291.92	3.79%
Biloxi, MS	54	\$126.20	\$55.23	\$87.73	\$269.16	14.56%
Birmingham, AL	56	\$154.79	\$40.75	\$95.78	\$291.32	-1.99%
Boston, MA	31	\$225.70	\$47.12	\$113.62	\$386.43	-18.89%
Buffalo, NY	44	\$167.01	\$51.87	\$85.87	\$304.69	12.52%

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www.businesstravelnews.com/Corporate-Travel-Index-Calculator

Tech-Forward Travel Booking and Management Apps

A new crop of tech-forward, mobile-first travel management startups have found success offering a traveler-friendly booking and trip service experience. Check out BTN's comparison of the features available from three of the most high-profile providers among this new breed: Lola has landed nearly \$82 million in total funding and last year forged a partnership with American Express GBT, while TravelPerk and TripActions have raised \$133 million and \$481 million, respectively. All three initially focused on serving small- to midsize businesses, but TripActions and TravelPerk now are challenging more traditional TMCs for enterprise clients.

	Lola	TravelPerk	TripActions
Biometric Sign-In	No	No	No
View Past, Current & Upcoming Trips	Yes	Yes	Yes
Sync with Calendar	Yes	Yes	Yes
Share Itinerary	Yes	No	Yes
Booking Capability	<ul style="list-style-type: none"> • Air • Hotel • Car • Rail 	<ul style="list-style-type: none"> • Air • Accommodation: Hotel, Airbnb • Ground: Car Rental, Rail • Premium Accts: Group venues & activities 	<ul style="list-style-type: none"> • Air • Hotel • Car • Rail
Flight Search	<ul style="list-style-type: none"> • AI-driven search based on user profiles and past trips • Can prioritize nonstop flights and user loyalty status 	<ul style="list-style-type: none"> • Filter and sort options • Branded fares and ancillaries 	<ul style="list-style-type: none"> • AI-supported filtering and sorting • ATPCO Next Generation Storefront • Access performance stats and amenity details
Flight Content Sources	<ul style="list-style-type: none"> • GDS • Amex GBT negotiated-rate inventory 	<ul style="list-style-type: none"> • GDS • Low-cost carriers • Consolidators and aggregators • NDC content 	<ul style="list-style-type: none"> • Negotiated, branded fares, loyalty status, ancillaries • Sourced through GDS, NDC and aggregators
Noncompliant Flight Booking Notification	<ul style="list-style-type: none"> • Out-of-policy bookings marked • Traveler required to give rationale • Administrator email notification 	<ul style="list-style-type: none"> • Labeled as out-of-policy • Blocking and non-blocking approval options • In-app approval requests 	<ul style="list-style-type: none"> • Policies displayed throughout booking process • Descriptions included when user hovers over option
Flight Payment Options	<ul style="list-style-type: none"> • Personal or corporate card • Centrally paid corporate card • Virtual card • Direct billing for select customers 	<ul style="list-style-type: none"> • Personal or corporate card • Centrally paid corporate card 	<ul style="list-style-type: none"> • Personal or corporate card • Business travel account • Unused or banked credits
Flight Alerts & Check-In	Yes	Yes	Yes
Trip Disruption	<ul style="list-style-type: none"> • 24/7 instant messaging • Rebooking options for all disruptions 	<ul style="list-style-type: none"> • Click-to-call customer care team 	<ul style="list-style-type: none"> • Notification and proactive outreach from agents

Lola

TravelPerk

TripActions

	Lola	TravelPerk	TripActions
Hotel Search	<ul style="list-style-type: none"> • AI-driven, based on traveler and company preferences • Search filter • Map view 	<ul style="list-style-type: none"> • Filter and sort • Ratings, reviews, set favorites • Customized to office location • Customized to travel policies and colleagues' booking history 	<ul style="list-style-type: none"> • Leverages machine learning for relevant results, based on individual past behavior, self-reported preferences and loyalty clubs, coworkers' stays
Hotel Content Sources	<ul style="list-style-type: none"> • GDS • Consumer sites • Closed user groups • Corporate-negotiated rates labeled • Lola- and Amex GBT-negotiated rates 	<ul style="list-style-type: none"> • GDS • OTAs • Aggregators • Direct • Airbnb 	<ul style="list-style-type: none"> • GDS • OTAs • Aggregators
Noncompliant Hotel Booking Notification	<ul style="list-style-type: none"> • Built-in policy • Hotels labeled as out of policy • Administrator email notification 	<ul style="list-style-type: none"> • Labelled as out-of-policy • Blocking and non-blocking approval options • In-app approval requests 	<ul style="list-style-type: none"> • Policy displayed throughout booking process • Description included when user hovers over option
Hotel Attachment	Automatically prompted	<ul style="list-style-type: none"> • Notifies traveler if overnight trip is missing a hotel reservation • Info on included amenities 	<ul style="list-style-type: none"> • Smart hotel search suggestions • Itinerary prompts to add hotel • No fee for adding hotel booking
Hotel Payment Options	<ul style="list-style-type: none"> • Personal/corporate card • Virtual card 	<ul style="list-style-type: none"> • Personal/corporate • Centrally billed corporate card 	<ul style="list-style-type: none"> • Personal/corporate card • Business travel account
Booking Modifications	<ul style="list-style-type: none"> • 24/7 in-app chat, click-to-call agent 	<ul style="list-style-type: none"> • In-app via chat, email or phone 	<ul style="list-style-type: none"> • Self-service via app • 24/7 agent support via phone, email, chat
In-App Flight & Hotel Cancellations	Yes	Yes	Yes
Security & Safety Alerts	No	No	Yes
Receipt Capture	One-click integrations with expense providers	No	No
Trip Assistance	<ul style="list-style-type: none"> • Shareable itineraries • "Follow my trip" map view and check-in integration 	<ul style="list-style-type: none"> • Live agent assistance via chat, email or phone 	<ul style="list-style-type: none"> • Navigation from Google Maps, Apple Maps, Waze • Uber, Lyft integrations
Travel Arranger Features	<ul style="list-style-type: none"> • Book on behalf • Traveler map • Automated travel policy • On-the-road email 	<ul style="list-style-type: none"> • Concierge support for premium accounts 	<ul style="list-style-type: none"> • Guest invite tool • Delegate booking • Delegate notification settings
Additional Features	<ul style="list-style-type: none"> • No booking fees • iPad app • Multiple travelers on one flight PNR 	<ul style="list-style-type: none"> • FlexiPerk trip insurance/refund service • E-train ticket download via app • Apple Wallet integration for rail tickets 	<ul style="list-style-type: none"> • Duty of care features • Advanced reporting • Dynamic policy • Carbon impact reporting & opt-in offsetting

Midsize Hotel Programs: Strike the Right Balance in a Changing Landscape

BY DAVID MARCUS

Travel buyers with small and medium-sized programs have more choices than ever in finding discounts and special pricing for hotels. Sadly, it has not made pulling a hotel program together any easier. Figuring out the magic mix to optimize options can be a bigger challenge than before, but it is the key to success for SME buyers.

SME buyers can negotiate volume discounts and send out requests for proposals in their key markets. That option is not going away in the near term, despite the “RFP Rest in Peace” proclamations made by industry “disruptors.” Nearly 80 percent of SME buyers, according to BTN’s Small & Midsize Enterprise Travel Management Report, used direct negotiations as their primary source for hotel discounts. While that survey was conducted in 2016, there is little evidence to suggest that SME buyers have discarded direct negotiations or jettisoned the RFP process. Many SME buyers continue to use direct negotiations, whether they negotiate on their own, rely on their TMC to handle the effort or engage with third-party consultancies.

SME buyers’ choices still boil down to two options in negotiations: fixed and dynamic rates. Fixed rates are flat rates directly negotiated with a property, perhaps with some seasonal fluctuations, for specific room types exclusive to that company. With dynamic rates, buyers get a fixed percentage off the constantly fluctuating best available rate.

Buyers who develop direct relationships with suppliers can achieve the deepest discounts over time. However, SME buyers often have few internal resources to manage the arduous process. They also might find suppliers less responsive compared with larger programs, especially in high-occupancy markets.

In response to the complexity, hotel chains began a hard push of dynamic pricing programs more than a decade ago. While signing on to dynamic discounts offered by chains is less time consuming than negotiating fixed or dynamic pricing with properties, savings negotiated through property-level agreements will be deeper whether fixed or dynamic. The savings expected from dynamic priced discounts overall, however, can quickly diminish when hotel rates peak. To further complicate matters, there are other options for SME buyers, including:

- TMC / Consortia hotel programs: Rates negotiated by travel management companies and consortia require



David Marcus leads HotelConnex, an independently operated division of ABC Global Services that delivers hotel sourcing and optimization solutions.

“Sadly, [having more choices] has not made pulling a hotel program together any easier.”

—HOTELCONNEX’S
DAVID MARCUS

no time and effort nor volume requirements, but they will not be as deep as discounts negotiated by buyers and are more difficult to quantify and track.

- Rate re-shopping tools: New technology allows buyers to game hotel yield management systems by continuously searching for better rates after booking. These can support negotiated rates if managed properly, but they also are prompting hotels to create more stringent last-minute booking windows and penalties.
- Hotel SME programs: More chains are offering special programs for SMEs with deeper discounts than what they could get from their TMC. These may come with requirements in client size, volume and distribution channel.

SME buyers looking for a silver bullet with any of those methods will be disappointed. Instead, they will have to create a blend of some—or perhaps all—of them. The right mix will differ with every program.

We’ve noticed some trends among our clients with effective hotel programs. Direct negotiations work best for SME buyers when they take a surgical approach with key markets, rather than trying to negotiate rates in too many markets. Looking outside the major chains at independent properties as well as newer hotels courting business will help maximize savings, too.

Buyers with concentrated volumes in secondary cities and suburban markets will find negotiations particularly effective. Rate re-shopping tools can help fill in the gaps here, and the data gleaned from these tools can potentially help clients in their negotiation efforts by assessing how many times a lower rate was discovered.

When SME buyers need to drive volume to larger chains, they might find the most success with dynamic pricing. It will help to be armed with traveler preference data, so buyers source the chains relationships accordingly.

Regardless of the discount mix, success comes down to an SME buyer’s ability to ensure compliance to the program. Among our clients, the best performers have compliance levels of at least 80 percent.

Boosting compliance does not mean stricter policy. Noncompliance often comes from traveler misunderstandings, so targeted communication can drive improvements. So can soliciting feedback. Buyers can use feedback not only to ensure they source and then monitor traveler-preferred hotels, but also to include amenities travelers need to be most productive.

SME buyers should be more strategic in how they measure the success of a program. If they only are looking at year-over-year savings with their hotel rates, they are missing several factors. Consider external market forces or savings through included amenities or proximity to travelers’ business location. Other metrics include benchmarking savings against peers, measuring savings achieved in negotiations versus a hotel’s first offer or measuring savings off hotels’ best available rates and traveler satisfaction. ■

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