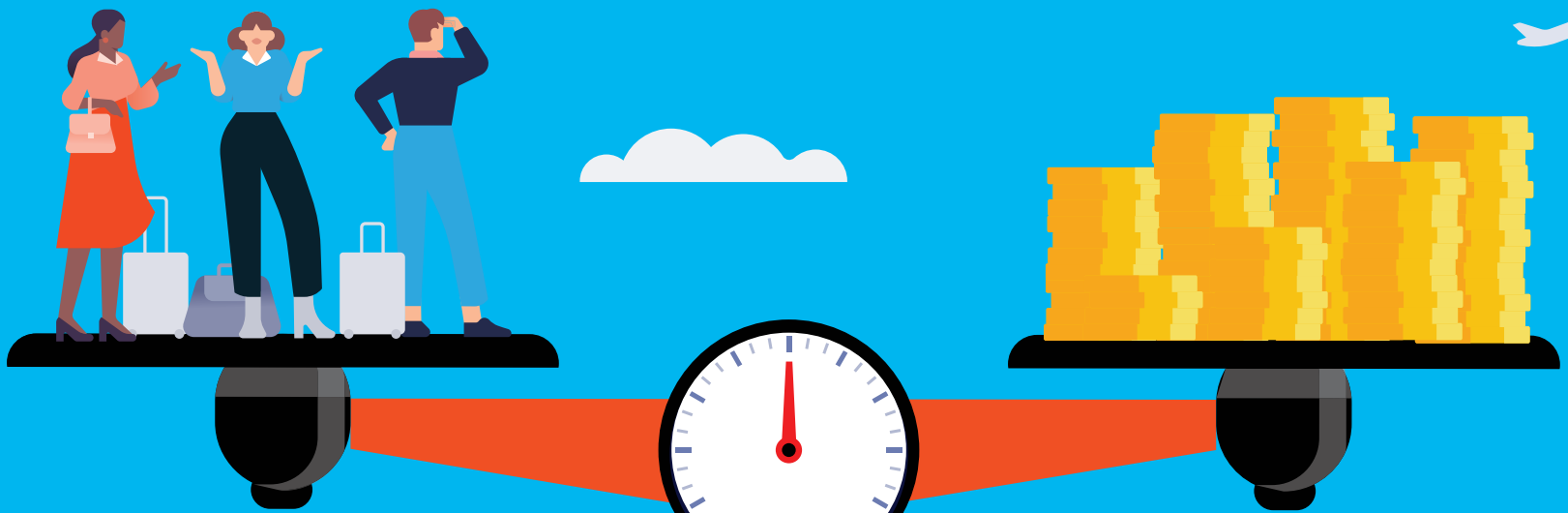


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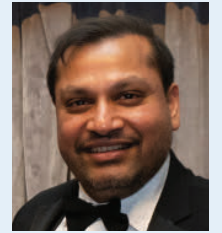
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Christie Hicks: Former Starwood Hotels & Resorts SVP of Sales



Reggie Aggarwal: Cvent Founder & CEO

BUSINESS TRAVEL HALL of FAME

CLASS OF 2019 | PAGE 16

TOP STORY

WHAT TO WATCH 2020

Predictions & Promise in the Year Ahead

Every January, Business Travel News invites managed travel experts along with our own editors to weigh in on the trends, tactics and technologies that will shape business travel over the next 12 months. In 2020, a handful of issues will loom large: how the industry addresses business travel's impact on climate change; the effects of travel management company consolidation; the promise of artificial intelligence and machine learning. Not all our prognosticators went for the big picture, though. Some saw big opportunities in more niche propositions: Should travel managers be ready to negotiate deals with food delivery app service providers? Will TMCs integrate payment services to realize a new revenue stream? Will direct-channel bookings become more friendly to managed buyers? BTN tackles these questions and many more as we all prepare for a new decade of travel management.

FULL STORY ON PAGE 8

Multiple Lawsuits Allege Major Hotel Cos. Failed to Prevent U.S. Sex Trafficking

BY DONNA M. AIROLDI

At least two federal lawsuits and one motion to consolidate 21 existing cases were filed Dec. 9 on behalf of women claiming they were sexually trafficked at hotels and that the hotel companies knew this behavior was happening and profited from it. The suits accuse several major hotel companies. The consolidation filing marks the first time the hotel industry is facing an action related to this issue as a group, according to Reuters.

A lawsuit filed in the U.S. District Court in the District of New Hampshire on behalf of plaintiff "K.B." names InterContinental Hotels Group, Wyndham Hotels and Resorts, Best Western International and Marriott International as defendants for having "known for more than a decade that sex trafficking repeatedly occurs under their flag throughout the country. Rather than taking timely and effective measures to thwart this epidemic, the Defendants have chosen to

ignore the open and obvious presence of sex trafficking on their properties, enjoying the profit from rooms rented for this explicit and apparent purpose instead."

The suit names hotels located in the New Hampshire municipalities of Concord, Keene, Tilton and Gilford, and requests a trial by jury and damages "in an amount which will effectively prevent other similarly caused acts and adequately reflects the enormity of the Defendants' wrongs and injuries to the Plaintiff due to the Defendants' faulty conduct."

A separate suit filed in the U.S. District Court in the Northern District of Texas, Dallas Division, names "F.M." as the plaintiff against defendants Best Western International, Hyatt Hotels Corp. and Red Lion Hotels Corp., and uses nearly the exact language in the introduction as used in the New Hampshire lawsuit. The Texas

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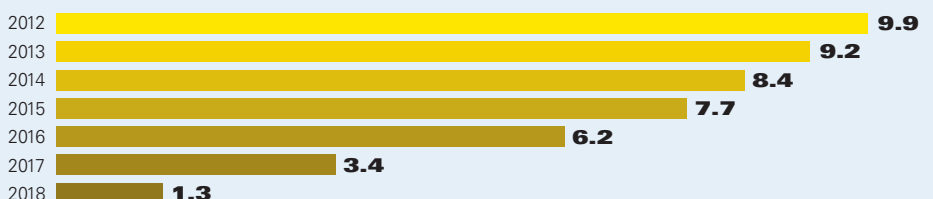


Hertz CEO Kathryn Marinello on making the right investments to win corporate marketshare.

"When your costs are lowered and the process is better, you are delivering a more customer-satisfying experience as well as freeing up funds to continue to invest in technology."

6 | Data Hub

Number of Passengers Denied Boarding Involuntarily Per 100,000 Boardings



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CWT Goes All In On China with Replatformed Digital Offering

BY JAY BOEHMER

Mega travel management company CWT in the second quarter will begin to replace its eight-year-old online booking tool and associated mobile application in the Chinese market with a rebuilt proprietary system.

MyCWT, which CWT has adapted to other markets, will roll out to CWT's base of clients in China this year. Eventually, it will replace the current CWT Online system. CWT late last month kicked off pilots of its new mobile-first offering, which facilitates online and mobile booking, trip management and agent interactions.

Its new tech suite also is the backbone of an invigorated push to win new clients and grow its position among China-based and state-owned companies, CWT president and CEO Kurt Ekert said in an interview this month.

China is of high strategic importance to CWT, Ekert said. After all, the market in 2015 surpassed the U.S. as the world's largest business travel market based on travel spending, according to the Global Business Travel Association. The Chinese business travel market also has been growing at a faster clip than major Western markets, according to GBTA projections.

CWT has had a presence in mainland China since 1996, which it serves with local partner China Air Service. CWT and CAS in 2003 formed the CWT China joint venture, which now employs 700 people in major markets including Beijing, Guangzhou, Shanghai and Tianjin.

Ekert did not disclose the ownership breakdown of its Chinese JV, but said CWT now has a controlling interest. A few years ago CWT competitor BCD Travel increased its stake in its own Chinese joint venture to a majority holding.

Other competitors in China include multinational TMCs like American Express Global Business Travel and BCD, which work with local partners, and also Ctrip, the major Chinese OTA with a corporate travel offering. Ekert also said many Chinese companies handle managed travel operations in-house.

CWT has had a "fulsome TMC offering" in China, which includes online booking and mobile tools, Ekert said, but these "will be replaced by the new Chinese MyCWT platform," to better address local



"China is a mobile-first market."

—CWT CEO KURT EKERT

The Beat

needs in payment, workflow and content.

CWT general manager of China Albert Zhong said the current CWT Online system in China tapped third-party booking and mobile tools, some of which are powered by TravelSky, the local market global distribution system. "It's now the CWT proprietary tools and platform" that underpin CWT's new offering, Zhong said.

Still, CWT worked with "several specialized Chinese travel, technology and e-commerce partners," according to the company. Ekert declined to disclose them. He said the system is hosted in China.

MyCWT for China was built to be "multichannel," which includes a responsive website, mobile capabilities and various touchpoints with travel agents, including live chat, email and phone. Users "can initiate a booking through one touchpoint, and then pick up where they left off on another," according to CWT.

Zhong said Chinese travelers gravitate to online, and particularly mobile, interactions and shun the telephone. "China is a mobile-first market," Ekert said.

CWT's replatforming in China included work to enhance the "digital capabilities that face counselors," or travel agents, to better provide offline support to Chinese customers. CWT has been shifting from green-screen agent desktops toward more modern interfaces.

CWT said China-based users also can rebook and process changes, cancellations and refunds through MyCWT, as well as use self-service tech for flight check-in and seat selection for rail and air.

CWT developed MyCWT for China with an "open API architecture," which "facilitates easy integration with third-party applications and clients' internal systems, allowing CWT to provide a broad selection of products, services and content," according to the TMC.

MyCWT also supports pre-trip approval, "a common requirement by companies in China," via email, text and mobile app "or through API integration with companies' own internal approval systems," according to CWT.

Like many markets, there also is "unique content" to account for in China, especially in the realms of lodging, rail and ridesharing, Ekert said. TravelSky remains an important source of content as an exclusive distributor of Chinese domestic air content, he said.

CWT is tapping other sources of content, including non-GDS aggregators and API connections to some low-cost carriers and Didi, China's analog to Uber and Lyft. CWT also is bringing in hotel content from its RoomIt lodging aggregation division, which includes content from 100,000 properties in China.

Zhong said there are a couple of providers of rail content in the local Chinese market that CWT taps.

The replatforming also includes support of widely used consumer-driven payment methods in China, WeChat Pay and AliPay, as well as payment methods more familiar to Westerners, such as credit cards. ■

New Name, CEO for Certify/Chrome River

BY ADAM PERROTTA

The corporate conglomerate encompassing Certify, Chrome River and four other expense management specialists is being united un-

der a single brand, dubbed Emburse, and former SAP Concur executive Eric Friedrichsen has taken the helm as CEO of the newly

unified entity.

A 30-year veteran of the corporate software industry, Friedrichsen joins Emburse from Marketo, a division of Adobe, where he served as global head of commercial, SMB and growth markets. Before Marketo, he was senior vice president and general manager for SAP's North American mid-market and ecosystems division.

Certify founder Bob Neveu, who served as group CEO since the merger, will depart the company. ■



Hertz to Continue Investment Strategy into 2020

Now completing her third year as CEO of Hertz Global Holdings, Kathryn Marinello has overseen a stretch of growing revenues and profits after some financially tough years for the car rental supplier. She recently spoke with BTN transportation editor Michael B. Baker about the drivers of the turnaround and the company's investment strategy to win corporate marketshare.

WHAT HAS BEEN YOUR TURNAROUND STRATEGY?

Our strategy has been that if you invest in and take care of your employees, both in the tools that you put in their hands as well as how you value them, they generally provide great service to your customers. Your customers then vote with their feet. We've had nine straight quarters of [year-over-year] topline growth since I've been here and eight straight quarters of profitable growth. Generally speaking, when you focus on the customer and the employees, the formula does end up driving profits as well as growth and customer satisfaction. We feel excited and great about winning the J.D. Power award for being the best rental car company. When you get confirmation from external sources, it's the ultimate satisfaction for our leadership team and the employees here.

WHAT SPECIFIC INVESTMENTS HAVE TARGETED THE CORPORATE TRAVEL MARKET?

We've really been a leader in that area. You can go right to the car with Ultimate Choice and bypass the counter. We have the best fleet out there, and for the frequent traveler, we've made it the quickest, most seamless experience with introducing not just Ultimate Choice but our Clear partnership. You can leverage the Clear partnership and not only bypass the counter but then don't have to stop at the gate and can use your Clear capabilities to get through the gate very quickly.

WHAT SPECIFIC TECHNOLOGY INVESTMENTS HAVE YOU BEEN MAKING?

We're looking not just at the tools we put in our customers' hands. We've made significant investments in our app as well as our website. But we're also investing in how well we manage the fleet. One of the real strategic advantages we have is that we also have a corporate fleet management company in Donlen Corp., and we've been leveraging the tools, maintenance and all the capabilities they have, particularly around connected car, to do a better, more effective, efficient job of managing the cars we



Hertz's Kathryn Marinello talks:

- Internal and external investment strategy
- Advantages to working with ride-hailing companies
- Finding niches for Dollar and Thrifty

"When your costs are lowered and the process is better, you are delivering a more customer-satisfying experience."

have. We're investing not just in the direct-to-consumer tools but in the fleet-management tools, the connected cars, our ability to quickly manage maintenance—all of these things drive greater productivity, and when your costs are lowered and the process is better, you are delivering a more customer-satisfying experience as well as freeing up funds to continue to invest in technology.

WHAT WILL BE YOUR PRIORITIES IN THE NEW YEAR?

We have launched our underlying technology to manage our fleet, and a new fleet management and accounting system. In addition, we're looking to launch by year-end a new reservation and rental system in some limited locates. We've launched a new app and website. We've come up with some great capabilities with our Dollar and Thrifty brands. We'll continue to invest in the technology to make the customer experience and the employee tools the best out there.

WHAT'S YOUR DEMAND OUTLOOK?

When we look at the economy and macro-economics, all signs are pretty positive. It's a very robust consumer environment right now, which translates for us to a good environment to work in.

HOW HAVE YOU ADAPTED TO THE RISE OF THE RIDE-HAILING NETWORKS?

One of the areas we're focusing in on and have built some core competence around is driver services and delivery. There was a lot of noise around [transportation network companies] cannibalizing our business. In reality, it was a very small segment that TNC took over: very short-range, one-day types of trips, which were about 5 percent of our business. We have between 40,000 and 50,000 vehicles on the road now to TNC drivers. It's fast-growing and profitable, and it leverages the residual value of our cars. We're able to drive them longer and get more value for them, and when we sell them, it's a very attractive price to the open market: at 70,000 miles, well-maintained and only two years old.

WHAT WORK ARE YOU DOING WITH THE DOLLAR AND THRIFTY BRANDS?

As we focus more on targeting groups in that space, Dollar can really focus on the family and use of the debit card, not building up a lot of debt. Then, with Thrifty, our goal is to focus on a segment where they think they're getting the best buy for their money. They get more for less, so they're not sacrificing quality. They're smart in how they're spending their dollars frugally. We've just launched a commercial for the first time since the brands were acquired. We've been spending a fair amount on driving strength in our brands. Hertz is a 100-year-old iconic brand that represents rental cars. We want to try to build the same focus for our Dollar and Thrifty brands with the segments that are most attractive for those brands. ■

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Assessing Involuntary Air Boarding Denials, On-Time Performance

The U.S. Government Accountability Office in December 2019 issued a report examining the frequency of and rationale for involuntarily denied passenger boardings on U.S. flights.

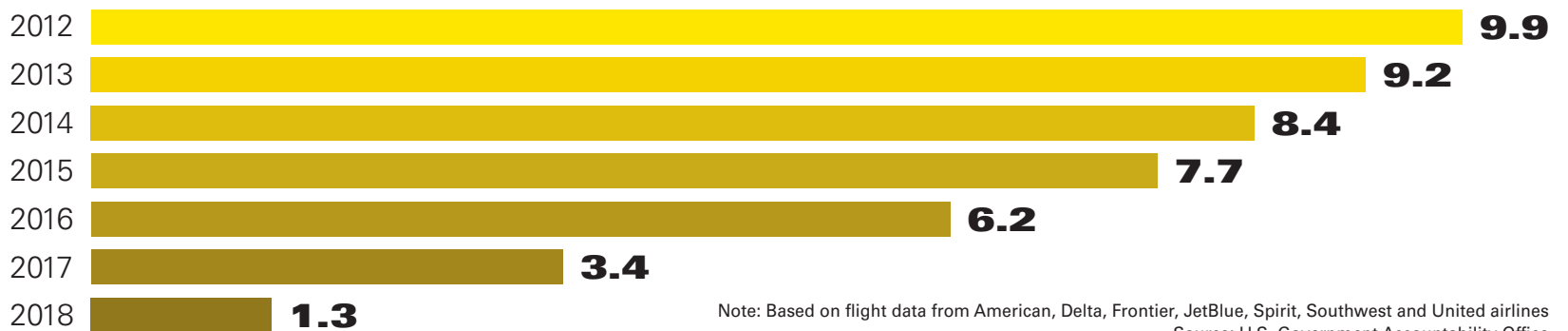
43

Passengers who were voluntarily denied boarding in 2018 for every one who was involuntarily denied.

64%

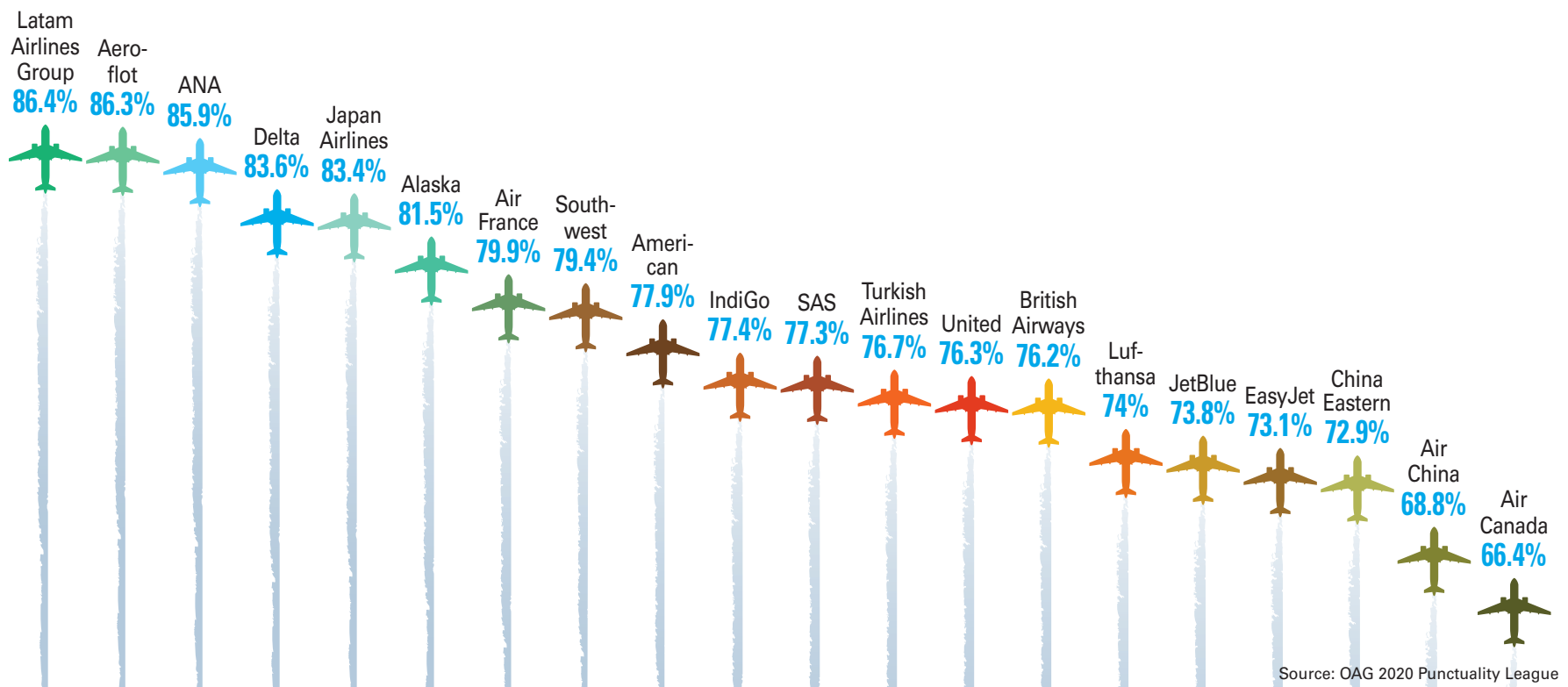
Of involuntarily denied passengers in 2018 qualified for airline compensation, down from 76 percent in 2012.

Number of Passengers Denied Boarding Involuntarily Per 100,000 Boardings



Note: Based on flight data from American, Delta, Frontier, JetBlue, Spirit, Southwest and United airlines
Source: U.S. Government Accountability Office

2019 On-Time Performance for the World's 20 Largest Airlines



Source: OAG 2020 Punctuality League



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6 New Flights from the U.S.!



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2020 Is the Year of Direct Booking Channels *By Susan Lichtenstein*

Hotel Security Will Become a Priority for Corporate Travel Managers
By Bob Quick

Flexibility on LRA & Same-Day Cancellation Can Drive Hotel Program Savings
By Jonathan Hamblett

The Food-Delivery App Battle Will Expand To Business Travel

By BTN Managing Editor Chris Davis



Ruthlessly competitive and exploding in popularity, the food-delivery app market is a fascinating landscape of high-stakes corporate combat. Their rising popularity assures the combatants will be bigger players in business travel in 2020. The nature of their fight, however, isn't quite so clear.

Far more clear is the impact these companies are having on dining experiences. Millions of users throughout the world in the past few years have begun to rely on these services as part of their dining routines. And they're growing rapidly: Uber Eats' 2019 revenue through September increased 74 percent year over year to nearly \$1.8 billion, for example. Grubhub's 2019 revenue through September increased 35 percent to nearly \$971 million.

Those two services, along with DoorDash and Postmates, comprise the vast majority of the U.S. delivery-app competitive set. They're quite competitive. According to a report from data analysis firm Second Measure, DoorDash was responsible for 37 percent of November 2019 of such U.S. food deliveries, with GrubHub at 30 percent, Uber Eats at 20 percent (though Second Measure warns that figure could be low) and Postmates at 10 percent.

In a time when room-service meal availability from hotel restaurants is waning and late-night searches for a bite might not be advisable, how might the business travel market be positioned in the food-delivery app war? Recall that the incorporation of sharing-economy stalwarts like Uber, Lyft and Airbnb into the business travel industry wasn't a top-down introduction from buyers or executives, but rather a bottom-up reactive strategy led by the inclusion of these services on business travelers' expense reports. That's already happening, so a broader strategy seems inevitable, even in the very short term.

In 2020, consider two ways in which these services will broaden their footprint in business travel.

Apps will sign preferred deals with corporate clients, offering reduced service and delivery fees in return for preferred status. The service fees charged by these apps can be a bugaboo for buyers—36 percent of 210 business travelers in a 2016 BTN survey indicated they'd run into reimbursement problems over these fees. A low, flat service and delivery fee in a particular city in exchange for preferred or even exclusive app would ensure travelers eat safely even at hotels without meal service. The apps' competitive position varies significantly by U.S. location, which might make a nationwide deal tricky, but smaller-scale deals could work. Buyers would need to document and prove they can influence travelers' app choices, but there seems a real opportunity for formalized use. Uber Eats already offers corporate controls around price caps and delivery times through its parent's Uber for Business offering.

Hotels will strike deals with apps for lower fees for guests. This is already happening: Wyndham Hotels & Resorts in May 2019 began offering guests no delivery fees on DoorDash orders, with an additional discount for first-time users, at all participating properties. Should other chains follow suit, business travelers could benefit from lower service and delivery fees.

However it plays out, the food-delivery battle bears close watching as a costly convenience with strong and growing appeal to business travelers. It's not going away, so better suit up.



Sustainability in Business Travel: Is it Finally Time?

By Serko SVP North America Tony D'Astolfo

Sustainability is a hot topic everywhere you look. It's in international and federal politics with the Paris Agreement and Green New Deal. It's in local communities given concerns about the impact of over tourism. Travel suppliers are pushing aviation biofuel initiatives and reducing plastic bottles at hotels. Given the ubiquity, is my question nonsensical? Of course, it's time—it's long past time for sustainability to become a cornerstone of business travel. Why ask now?

I've seen a thing or two when it comes to business travel. We've had the opportunity to drive more sustainable behavior for a long time, but we haven't done it. Eleven years ago, the following excerpt was published in Design News:

Rearden Commerce has produced a green-focused personal assistant that provides business travelers and organizations with a "Total Green Travel Experience" when booking travel and related services. The assistant's functions include a "Carbon Calculator," hybrid car services and Web and audio conferencing.

The tool is designed to help users save time and make green travel choices. The Carbon Calculator shows users "Did You Know" factoids on the amount of emissions produced by the flight they're booking. The assistant then offers the user a convenient and ecofriendly option of booking an audio or Web conference as an alternative. If the user clicks on the link and takes advantage of the alternative, the calculator shows the number of pounds of carbon dioxide that have been saved from entering the atmosphere.

The effort my former company made, at considerable cost, was extremely well received. People lauded our forward thinking and for providing a vehicle not only to raise awareness but to provide actionable sustainability. But guess what? We got very little takeup at either the traveler or company level. You could argue the tool was clunky, or Rearden was a small part of the business travel landscape, or other sustainability initiatives had impact. If we take a step back, though, has anything actually changed?

Whether you believe global climate change is a real threat is not the point, and whether there are options available for companies and individuals who want to be more sustainable is also not up for discussion. My question is focused on whether you think sustainability's time has come in business travel. I think it has, and here's why:

Economic impact: Economically, something as simple as using less fuel is good for business. Airlines have been doing that for years. Finding ways to recycle is cost-effective, and today's technology is better at doing it.

Social awareness: Eleven years ago, Facebook was relatively new and Twitter and Instagram weren't around. Social media has changed the way we do everything and more importantly how we talk about things.

Personal responsibility: Today's business travelers and travel managers have changed. We've seen a rise in the percentage of Millennial and Gen-Z business travelers as well as in corporate management roles. These generations are more aware, interested and engaged in all things climate. That, combined with the power of social media to both communicate and shame, suggests their voices will have impact.

So, is the time now? Yes—but I'm still a bit of a skeptic. I'm not sure any generation of traveler would willingly fly in the less-carbon-impactful economy section on their next eight-hour, overnight international trip, but maybe these new travelers will prove me wrong. What do you think? Is sustainability in business travel here, or are we all just full of hot air again?

2020 PREDICTION POINT

Hotel Resort Fees Will Magically Disappear in 2020

One of the most hated fees in the travel industry are the hidden resort fees of \$25 to \$75 that many hotels charge you when you check into a hotel. There are currently two major lawsuits pending against Marriott and Hilton that are challenging these fees. I think the stars are aligning to get this done in 2020.

Executive Travel CEO Steve Glenn



When Trends Collide: Sustainability & Personalization

By Tripism CEO Adam Kerr

With climate change in the news daily, there's no question an increasing number of employees worry about the environmental footprint of their business travel. Many would happily make greener travel choices if that information was presented to them alongside rich, personalized supplier content. I'm hopeful this decade will link the dual trends of sustainability and personalization and potentially deliver huge benefits to both the environment and the traveler experience.

Over the last decade, corporate travel teams have been responsible for significant carbon-reduction initiatives within the enterprise. Great gains remain to be made if we empower business travelers to make travel choices that better reflect their personal values and are also better for the wider environment.

In the last few years, the International Air Transport Association has created basic industry standards for aviation emissions. A few solution providers like KDS Neo have integrated a green option into the online booking tool, allowing users to choose routes based on low emissions, rather than cost or journey time.

But sustainability is about so much more than carbon emissions and right now, it's the wild west when it comes to defining what counts as "green." Travel suppliers by and large are using their own metrics to measure and communicate wider sustainability. This free-for-all confuses travelers and leaves the industry at risk of so-called "greenwashing."

If we're going to see business travelers embrace sustainable choices en masse, we urgently need an industrywide push, with perhaps GBTA or ACTE getting behind the challenge to create standards. These standards need to go beyond a traveler's carbon footprint. They need to account for supplier water usage, policies on single-use plastics, reliance on non-renewable energy, commitment on food miles—the audit goes on.

For now, it's left to corporate travel teams to try and put the pieces together to advise business travelers. That advice is bound to be piecemeal at best and, crucially, travel teams have no way of presenting that information when the traveler most needs it—at the point of booking.

Most booking platforms have done a bad job at providing actionable information on sustainable travel choices. Business travelers need comparative emissions information on flight routes, rail routes presented alongside flights, the option to hire electric cars and to stay in carbon-neutral hotels. It's not enough to tick the green box. And how many would happily forgo the free newspaper at their hotel or access to an airline lounge in exchange for the greater benefit of a tree being planted to help offset their trip?

There's a new generation placing more value on reducing their carbon footprint than on whether they fly silver or gold. If businesses and their travel suppliers can get this right, they'll be able to recruit new talent from a position of strength and win a new, greener kind of loyalty from their employees and customers. And the planet will thank them for it.



More T&E Providers Will Add Payments Piece

By BTN Payment & Tech Editor Adam Perrotta

Corporate travel booking, trip management and expense reporting have become ever more closely integrated in recent years, with travel managers, corporate leadership and employees alike all recognizing the benefits of a unified model. But one major piece of the corporate travel puzzle—payment cards—remains an outlier, largely siloed as a separate service provided by an issuing bank.

But there are signs the walls around corporate payment cards could be lowering, with a spate of travel and expense management providers rolling out payment products of their own over the past several months. By adding an in-house payment piece to their other T&E services, those providers can offer their corporate clients improved data capture, tighter spending controls and simplified reporting and reconciliation. Meanwhile, providers often get a cut of the transaction fees merchants pay for card purchases, tapping into a new, potentially quite significant revenue stream.

Among the corporate T&E players to bring payments into the fold are Expensify—which in October announced its own branded physical and virtual payment card—along with Emburse, the newly rechristened expense conglomerate that arose from the 2019 merger of Certify and Chrome River. Emburse was a corporate payment card startup Certify/Chrome River acquired several months after joining forces, and the re-branded company is in the midst of integrating the payment service across the half-dozen expense brands within its portfolio.

Another high-profile payment provider acquisition came in late 2018, when tech-centric travel management specialist TripActions nabbed startup Divvy and its integrated payment card and expense system. TripActions is rumored to be preparing a new payment product for launch this year.

Meanwhile, Bento for Business continues to draw interest from investors and corporate clients for its integrated payment card and expense platform, and cloud-based expense provider Fyle recently rolled out an update that enables corporate card payments to flow directly into its expense management tool via application programming interface.

Legacy travel management providers have joined the payments game too. In October, BCD Travel announced it would be the first TMC issuer of card accounts for UATP, the airline-owned payment network. By issuing its own cards, BCD gains direct access to Level 3 transaction data from spend on those cards, such as airline, city pair and class of service. That data, in turn, can flow to BCD's corporate customers, who are ever hungrier for robust travel data to leverage for strategic planning, budgeting and supplier negotiations, among other uses.

As TMCs grapple with their changing role amid ongoing disruption of traditional distribution models, providing an in-house payment solution can function as an attractive new service for clients. And with demand increasing for virtual card payments in the corporate travel space, many T&E providers likely are looking to play a more central role in delivering virtual card services.

Better data, greater spending control and improved traveler experience all are high on the wish lists of today's corporate travel managers. As T&E providers look to fulfill those imperatives, offering their own payments products could be a play that pays off handsomely for buyers and suppliers alike in the year ahead.

The Direct Channel Will Tie In TMCs & Travel Managers

By ARC COO Lauri Reishus

With the immense scale and complexity of air travel, our industry still relies on many legacy frameworks that weren't designed to meet the needs of modern travelers. One framework—the stark division between the direct and indirect air travel sales channels—will be dismantled in 2020.

Airlines, travel managers and travel management companies need to collaborate to build omnichannel solutions, delivering greater transparency and an enhanced customer experience.

Business travelers are high-value clients for both airlines and travel agencies, and they generate revenue for their employers. Those travelers want to book in their preferred channel, whether that's through their TMC, online booking tool, or the airline website or app, where they can take advantage of loyalty perks. By booking direct, however, travelers lose access to valuable TMC servicing and duty of care, leaving their travel managers with gaps in program data.

Travelers expect seamless experiences: They want the ability to buy anywhere and receive service from anywhere. Airlines want to enable direct booking experiences that give travel managers and TMCs transparent access to that important traveler data they're missing. Travel managers want to open up servicing capabilities to TMCs.

In 2020, channel-agnostic technology providers will begin to connect the dots between airlines, travelers, travel buyers and their partners in the direct channel. As transparency increases across these connections, a new ecosystem will emerge, where direct and indirect bookings are essentially treated as one and the same.

As the omnichannel environment expands, corporate travel programs will become more traveler-friendly without sacrificing high-quality data. Travel managers will begin to transition from “looking the other way” for certain travelers' direct bookings to more actively engaging with and managing them, creating deeper transparency and accountability, while designing more creative, traveler-centric policies that measure new key performance indicators like trip success.

As travel programs become more diverse in design and scope, TMCs will be the linchpins that hold them together. Managing post-ticketing functions on behalf of travelers, travel buyers and airlines will remain critical in an environment where about one-quarter of corporate itineraries require changes.

The role of TMCs as data and reporting stewards will also expand, delivering even greater value in simplifying complexity for corporate customers. As transparency increases, data privacy and security will also need to be carefully managed.

Travel managers will turn to TMC partners for more consultative guidance in this progressively complex environment. By managing disparate traveler data, TMCs will have a unique perspective that equips them to advise on program and policy design, as well as technology selection and implementation.

As a result, airlines, travel managers, TMCs and travel agencies will all reap the benefits of happier, more productive business travelers. Beyond 2020, travelers will ultimately be able to buy anywhere and service anywhere—with perks and within policy.



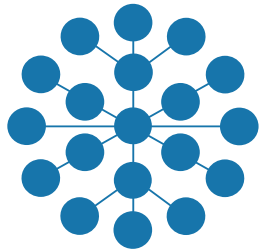
2020 PREDICTION POINT

More Companies Will See Value in Direct Flights

More companies will allow their travelers to pay \$100 or more for a direct flight. With airlines flying their planes 90 percent full, there are only a few seats available if a flight is canceled or delayed. Add a major storm into the mix and missing a connecting flight in 2020 might mean a business traveler sits in the airport waitlisted for the next available seat, which might be two to four days later.

Executive Travel CEO Steve Glenn

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“

Excellent event. The amount of time focused on innovative products and services was impressive. Great dialogs and debates in the **Master Classes**.”

- John Packel, Head of Product, Smart Hotel Rate

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Great conference to check out the latest technologies in the corporate travel world and the people behind them.”

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The Need for Speed: The New Opportunity for Traveler Servicing

By Festive Road Tech Geek Aurelie Krau

You probably won't get to the end of this article. Our attention spans are getting shorter, dropping in the last 20 years from 12 seconds to just eight today.

Unlock. Click. Tap. Load. Swipe. Like. Book. Pay. Ta-da. Done!

The Path to More

We live in the world of the three I's: information, interaction and instantaneity. The early 2000s set the path for our always-connected world of smartphones, social media, collaborative platforms and hyperlinks in the middle of everything you read. But we have just entered a new era, so get ready for much more. A major technology shift is underway which will undeniably have an impact on our personal and professional lives in the coming years.

More information: Data is created and consumed every second at an exponential rate. It's generated by mobile usage and ever richer content: high-definition pictures, live streaming, videoconferencing, live chat and social media live feeds are just a few sources.

More interaction: Pretty much everything we do depends on connectivity today, from a simple Google or Alexa query to advanced artificial intelligence, telemedicine, self-driving cars, augmented/virtual/mixed reality and even more futuristic technology. All the things that will make our (business) lives easier, safer and healthier will require high-speed transmission technologies.

More instantaneity: The promise is that 5G will transmit data at incredibly fast speeds—the kind that would let you download an entire movie in a few seconds, keep up with mobile devices on high speed trains, connect hundreds of thousands of objects together. We are talking about a tech more than 600 times faster than the typical 4G speeds on today's mobile phones. According to EVP & CEO of Verizon Consumer Group Ronan Dunne, a lot of businesses haven't really realized how revolutionary 5G is. At The Web Summit in Lisbon last November, he said it will reshape business and society: "It's not simply a faster horse, it's what the automobile was to the horse."

What Does it Mean for Travel? Meanwhile, in the travel sector, the maturing of the API world is the first step that will bring our industry to the next level. It is now becoming possible to plug and play content and inventory much more easily than in the previous decade. Plus, industry tech standards are aimed at facilitating connectivity.

With all this in mind, it's time to shift our thinking beyond the shopping experience and, instead, focus efforts on services brought to travelers while they are on-the-go. The mobile device is the business traveler's best friend. The maturing of the mobile world and the emergence of hyper speed through 5G offers those with traveler touchpoints today to leverage all that lovely data and give the traveler what they need, when they need it. Time to reload the traveler experience.

Good news: Your travel strategy has just reached a whole new level for 2020. Swipe. Lock. Done.



Ground Transportation Policies Will Need a Second Look in 2020

By BTN Transportation Editor Michael B. Baker

Uber and Lyft each have vowed that 2020 will be their last year with four quarters in the red, but that path to profitability might give travel buyers a reason to reevaluate their ground transportation policies this year.

Both ride-hailing companies went public in 2019, and subsequent earnings reports showed fast-growing bookings—and losses—for each. Uber, for example, reported a loss of \$1.2 billion in the third quarter alone, while Lyft's third-quarter loss was \$463.4 million, nearly double the loss of a year prior. Uber CEO Dara Khosrowshahi has set a goal for 2021 to be the company's first year of profitable earnings, while Lyft executives said 2019 will have been the company's peak loss year and that earnings would be positive by the fourth quarter of 2021.

At the same time, the companies are facing increasing regulatory pressure from several angles. In November, Uber lost its license to operate from Transport of London, which cited a "pattern of failures" related to passenger safety and verifying drivers' identities, which it is appealing. A December court ruling in Germany, where Uber also faces harsh regulations that leave it largely as an intermediary between professional taxis and chauffeured transportation suppliers in the country, stands to further restrict its operations there.

U.S. regulations are becoming a bigger issue as well. California this year is enacting a law to cut down on companies' use of independent contractors. Uber already has tweaked its model within the state in anticipation. Chicago, meanwhile, this year started a tax on ride-hailing rides, meant to cut down on traffic congestion, and New York is sorting through its own congestion-pricing scheme. All of this means that Uber and Lyft rides potentially could become costlier this year, not just due to taxes and regulations but also as the companies face increasing pressure to become profitable.

"The price of [ride-hailing] products once again is going to have to go up because nothing else they do is working for profitability," said Dave Kilduff, CEO of DK Consulting Group. "How long will investors allow them to lose massive amounts of money and still invest?" Increased prices from ride-hailing suppliers could give traditional ground transportation suppliers leeway to raise their rates as well. "In the limo side of business, because of the pressure from Uber and Lyft, they haven't been able to take price increases in a number of years," Kilduff said. "Prices have been held down for four or five years."

Outside of price, duty-of-care concerns linger for the ride-hailing providers. Uber last month published a report showing it had received more than 3,000 reports of sexual assault on trips in 2018. For Uber, publishing the report was meant to show relative safety, as that number was among about 1.3 billion total rides, and about half of those were cases in which the driver, not the passenger, was the victim. Even so, the companies are facing legal challenges that they are not doing enough to prevent these assaults, which adds fuel to the duty-of-care discussions that have circled around corporate usage since their inception.

As such, this might be a good year to address ground transportation in their travel policy. Even for those who have, it will be worth paying attention to budding technology offerings that seek to integrate all sorts of transportation offerings. Car rental suppliers, for one, are working on incorporating such features in their apps, and several third-party suppliers are in various stages of development, Kilduff said. "As prices go up, companies should want to start re-comparing what the better pricing and duty-of-care options are, and you want to see it at the time of booking," Kilduff said. "That's a part of this buildout."

2020 PREDICTION POINT

More Channels Emerge, Without Significant Consolidation

Travel booking has evolved from phone calls to websites, mobile and apps, while no channel has fully disappeared. 2020 will be no different, communication channels will continue to increase, with bots and voice AI increasing in adoption and consumers expecting the ability to adjust travel and communicate needs in real-time—in whatever channel they prefer—without skipping a beat. Information will need to carry over, a traveler will expect to be able to start on the phone, hop online to a website and pick a flight, then adjust a booking through a voice-enabled app—minus the friction. End-to-end will be the end all, be all for 2020.

Egencia SVP & Chief Product & Technology Officer Alex Kaluzny

The Beat

RESEARCH

TMC STRUCTURE, SOURCING, SATISFACTION

For a new research report, *The Beat* surveyed travel managers to untangle the inner workings of one of the most critical, and perhaps complicated, relationships in corporate travel: that between travel buyers and their travel management companies. TMCs take on various roles for organizations: transaction enabler, policy developer, compliance enforcer, technology implementer, savings optimizer and data provider, among many others. Given the range of roles TMCs play and the diversity of managed travel clients, the composition of these relationships vary widely.

THIS IN-DEPTH REPORT AND WEBINAR EXAMINE:

- How do TMCs and travel buyers structure their commercial relationships?
- How frequently and through what means do buyers source TMC partners?
- Which TMC services do buyers most value and what drives their satisfaction?

READ THE REPORT AND REGISTER FOR THE FEB. 6 WEBINAR:
<http://bit.ly/BeatResearch-TMC-Structure-Sourcing-Satisfaction>

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Business Travel Tech Will Strike Envy in Leisure Travelers in 2020

By TripActions Co-founder & CTO Ilan Twigg

Leisure travel long been has considered better than work travel, but 2020 is the year that business travel will become the envy of leisure travel, thanks to technology advances—particularly machine learning—that will deliver a superior business travel experience. The tech has advanced in tandem with businesses’ desire to build processes that drive a better employee experience. Likewise, employees’ personal tech has advanced such that an outdated travel management solution reflects poorly on the company.

I’ve built my career by using the power of machine learning to transform and simplify complex systems for end users. Machine learning, a subset of AI, analyzes big data, looks for patterns and then makes decisions based on those patterns—with minimal human intervention. The very traits that make business travel ripe for disruption—frequent travelers, repetition of travel, detailed traveler profiles, and known office locations—make it an ideal use case for tech.

In 2020, machine learning will transform business travel to beat leisure travel on convenience, personalization and experience:

Convenience & Choice. One of the top reasons business travel sites frustrated users in the past was a lack of inventory—specifically, not having the right inventory at the right price, especially compared to consumer sites. In 2020, corporate travel platforms will offer a broader selection of inventory that ensures business travelers have access to everything, including negotiated and direct rates, within a single platform. Through Next Generation Storefront, business travel inventory (e.g. seat pitch, on-time stats, photos of the room, etc.) will be presented in a way that is more complete, transparent and easier for bookers to compare in detail. Add New Distribution Capability, and that content will be provided with bundled ancillaries, further simplifying and improving the booking experience.

Personalization. In the same way that Netflix uses data to present what you might like to watch next, machine learning leverages data from an individual’s profile combined with data from past bookings to present the most relevant search results. As the platform learns with more data, that content becomes ever more relevant.

This is where business travel platforms have the advantage over leisure. Business travelers travel more frequently, which means more data for algorithms to ingest. In addition, their travel behavior tends to be more consistent. That large amount of consistent data makes it easier and faster for algorithms to learn and predict behavior.

A Better End-to-End Experience. Today, consumers might receive notifications on a delay, gate change, or room availability, but must fend for themselves when something goes wrong. If they aren’t a frequent traveler, they may find themselves standing in a long line waiting to get rebooked or on hold over the phone. Machine learning has completely changed this for business travelers. As soon as the data shows that a business traveler will miss a connection, the platform can automatically book them on the next available flight, sending an alert notification.

The most advanced business travel apps have also enabled users with options to chat, email or call—whichever is most convenient. And machine learning steps in again for the win, equipping the travel agent with all the details of who the traveler is, their preferences, their current trip and their booking behavior so they are immediately able to solve the business travelers’ needs.

We’ve reached an inflection point in business travel empowered by machine learning tech that’s been developed, tested and proven in the market. In 2020, leisure travel may take some notes from the business travel experience lest we start hearing about the “businessization of consumer travel” just as we’ve long heard of the “consumerization” of just about everything, including business travel.

2020 PREDICTION POINT Artificial Intelligence & Machine Learning Usher in Global Negotiations

AI/ML began to offer new savings in 2019, as features like automatic rebooking when prices drop and hotel and air choice optimization by policy, hit traveler screens. In 2020 the technology goes from early savings to global contract shifts as travel managers see AI and ML imbedded—even deeper—into travel management platforms. Expect contract renegotiations to become more sophisticated as the technology uncovers and recommends new areas to optimize by region, and at global back-end scale.

Egencia SVP & Chief Product & Technology Officer Alex Kaluzny

More TMC No-Bids Mean Buyers Selling Like Never Before

By GoldSpring Consulting Partner Will Tate



TMC industry consolidation leads to TMC market power, which creates the ability to be more selective about selling opportunities. Buyers will see this in even greater numbers this year as TMCs become more inquisitive about their prospects before agreeing to enter a sales process. Some will require client interviews up front (with some requiring senior management attendance) while others will pre-qualify via intake surveys.

As TMCs have morphed into combo distribution hubs, service centers, hotel content providers, and mobile enablers (all while still processing core transactions), the definition of a TMC customer can mean many things. TMCs will holistically evaluate each of these opportunities against its peer share commitments, growth markets, employee capacity, technology maturity *and* client fit. And, unless there is a clear path to value, TMCs will be more and more reluctant to fully bid.

It is imperative that buyers anticipate this trajectory and ready their company’s value propositions. Last decade’s “we are the customer” mantras are lost on these new TMC focus areas. Buyers must present compelling reasons for potential supplier change, plans to mitigate any risks, improvements hoped for, and very importantly, the level of senior management support achieved. Lining up these key areas prior to considering a bid will help guide the TMCs to choose to participate.

No doubt some buyers will see these as pre-sales tactics, not very different than years before. However, TMCs have now quantified opportunities fully with multinational travel buyers as expensive sales propositions and must make internal justifications before proceeding.

Savvy buyers will prepare and control their storylines prior to going to market. Finalizing key points for consistency in talking with the entire market simplifies the discussions to relevant, hard value points which are easy to digest for all concerned.

Ultimately, both TMCs and buyers want qualified opportunities from each perspective. Answering all large questions creates a trust up front that benefits all parties as the process plays out. Jack Welch said it well: “Strategy is simply resource allocation. When you strip away all the noise, that’s what it comes down to. Strategy means making clear-cut choices about how to compete. You cannot be everything to everybody, no matter what the size of your business or how deep its pockets.”



TMC Consolidation Accelerates, Leaving Messy Aftermath

By Butler Caroye Managing Director Tony O'Connor

Mature industry sectors often consolidate in ebbs and flows with periods of high activity followed by periods of digestion. The larger aggressor companies need a couple of years to assimilate the new businesses and stabilize balance sheets. The TMC sector looks as if it might need a breather at the moment. But I think the opposite is happening: Activity is accelerating. It's fueled by a renewed need for scale, necessitated by three main factors.

First, the technology gap is doing a U-turn. When online booking tools and other systems became expected deliverables from TMCs, large outfits had an initial advantage. But as IT became cheaper and ubiquitous, every TMC could afford systems good enough to compete, at least at the local level. Stage Two has begun and it is all about OBT globalization—universal crossborder booking systems. The developing mega-OBTs are either in-house or preferentially tied to global TMCs. As the percentage of bookings able to be made via OBTs heads towards 100 percent, the terms that a TMC has for its OBT supply become a bigger determinant of its profitability. Smaller TMCs are at an early disadvantage again, but this time they might not have access to competitive OBTs soon enough because of the control large TMCs have over the next generation of OBTs. And this time the financial impact will be greater because more bookings are being made online.

The second and third factors are NDC-related. Surprise surprise.

TMCs will have to spend serious money to connect with NDC-based booking channels. Reintegration will be a cost, and it looks like TMCs will have to foot the bill. If GDSs do the job (which seems to defeat the airline industry's purpose a bit), that cost will be passed onto TMCs anyway. The cost of integration was historically subsidized by the airlines. And the airlines are in the process of removing the subsidy. One way or another, this will hit TMCs in the form of higher IT costs, again favoring large TMCs.

The third factor is a simple financial impact. In many cases, NDC means that TMCs no longer receive substantial commissions from GDSs in the form of segment fees, which have accounted for a third to a half of their profitability. Large TMCs have been making background compensatory deals with airlines to soften the impact. These are confidential, but given the lack of complaint from major TMCs about the impact of NDC on GDS segment fee revenue, the compensation must be reasonably generous. Small agents and TMCs are not receiving the same level of transitional assistance, putting their balance sheets under further strain, making them less competitive, and making them more eager to sell up.

I thought at one stage that my three-factor consolidation model might be a bit theoretical. It sounds good, but is it really happening? I stopped worrying when I heard that a midsize U.S.-based TMC had been knocking on doors trying to buy small mixed retail TMCs in Australia. The fish are hungry and roaming far and wide.

My concern for travel buyers is this: The next season of TMC consolidation could happen too quickly for the industry to maintain good service levels. Takeovers can cause serious service disruption for the acquired and the acquirers if not done well. This is true for any industry. It takes resources, care and time. TMC services are quite fragile by nature, and would be susceptible to internal distraction, indifference or interference.

2020 PREDICTION POINT Get Ready for Facebook's Libra cryptocurrency in 2020

Cryptocurrency ideas exploded on the scene in 2017 and then in 2018 fell like a rock. In 2020 Facebook should be able to commercialize its Libra cryptocurrency to the point that you can use it to pay for your air and hotel expenses.

Executive Travel CEO Steve Glenn



Hotel Unbundling Leads to More Booking Chaos in 2020

By BTN Lodging & Meetings Editor Donna M. Airoidi

The use of artificial intelligence to parse traveler data to provide more personalized booking choices has been on the upswing. Proponents tout better selections, increased time and cost savings and higher program compliance.

At the same time, there is a movement toward attribute-based shopping, or the unbundling of hotel rooms, not unlike the airline sector's embrace of ancillary-based displays, which continues with New Distribution Capability. (The backlash against unpopular resort fees is partially leading this charge on the hotel front.)

Sure, there's already been pricing segregation based on room type: king-sized versus queen-sized bed; standard room versus suite; a room on the corporate floor, complete with lounge perks. But now technology could allow for differentiated pricing on whether the room is near the ice machine, what kind of linens are used, whether bottled water is included, pillow selection, fitness center access, pool access, breakfast, parking, carbon offsetting, in-room eco-products and room cleaning. (Folks have gotten used to paying a separate cleaning fee on Airbnb.) You name it.

What then would be defined as a "standard" room for a travel program? All these a la carte options could be offered as individual rooms in an online booking tool, making the choices seem endless. To make this the perfect storm, most OBTs now include content from online travel agencies and Airbnb—in order to make the corporate booking experience more like the consumer experience and to try to lower leakage.

But do travelers really trust their corporate booking tools, or do they still go outside the program to double-check availability and prices? Won't all these additional options just push them further in that direction, to outside sites to make sure they're getting what they want at the best price?

Or, the use of data and AI could take a traveler's past selections and bundle together a hotel room "package" that offers the traveler's preferences from past stays all in one option. That sounds great, right? Get what you want and pay only for what you want. Plus, it's served up as one of the top choices in the OBT.

That is the direction the market is heading, but it will take time to capture enough data to make the technology and algorithms accurate and comprehensive enough to ensure trust and loyalty on the part of travelers. If and when that is achieved, then companies could begin to see increased time and cost savings and program compliance. In the meantime, though, travelers are likely to get even more choices that could lead to delayed decisions. And once the OBTs are able to offer preference bundles, what if they actually end up costing more than if they were priced out individually? There's nothing to stop the set-up of the system from offering a premium price for giving a traveler exactly what they want. So, cost savings at least in 2020 still could be up in the air.

CONGRATULATIONS TO THE BTN GROUP BUSINESS TRAVEL HALL OF FAME CLASS OF 2019

REGGIE AGGARWAL

Cvent founder and CEO

"We focused on survival. We were very passionate about what we did. And we knew that over time, organizations would be logical and adopt technology like ours."

Reggie Aggarwal founded market-leading meetings, events, and hospitality technology provider Cvent in 1999 as a two-person startup. Today, Cvent has more than 4,000 employees and a platform that powers millions of meetings and events across 27,000 organizations for 300,000 users worldwide. Cvent, which was a publicly traded company, went private in November 2016 when it was acquired by Vista Equity Partners. Reggie remained the CEO and President of Cvent following the \$1.65 billion transaction.

Reggie was named the No. 1 SaaS CEO by The SaaS Report in their 2019 and 2018 Top 50 CEO list, CEO of the Year and the most admired CEO in the Washington, D.C., area by the Washington Business Journal, Entrepreneur of the Year for the Washington, D.C., area by Ernst & Young, one of the 100 most intriguing entrepreneurs by Goldman Sachs, and a rising star by Forbes.

Reggie graduated with a B.S. degree from the University of Virginia, a Juris Doctorate from Washington and Lee University Law School, and an LLM post-law degree from Georgetown University Law School. He also received an honorary doctorate from Southeastern University for his contribution to the community.

RALPH COLUNGA

SAP Concur travel and expense technology solutions thought leader

"For a while, I was thinking about command and control. But then I realized, how is it I can trust someone to negotiate a \$2 million deal but [not to] make a decision on a \$200 airline ticket?"

Recognized for his vision, innovation and dynamic leadership style in his efforts to help advance globalization, standardization and simplification of travel and expense and card programs, Ralph Colunga, a senior member of the SAP Concur Business Operations management team, assists the product development teams and supports the global sales and marketing efforts of SAP Concur's travel and expense solutions and services. Previously, he was vice president of global mobility, managing the travel, corporate card and lease car programs at both SAP and SAP Concur. During his 30-year travel industry career, Ralph established and managed global travel, expense and card programs at AMD, Cisco Systems, Oracle and Salesforce.com before joining Concur and then SAP. The Association of Corporate Travel Executives in 2002 and 2011 recognized his global vision and worldwide excellence in managing corporate travel and expense. The Global Business Travel Association in 2013 recognized Ralph with their inaugural Spotlight on Transformation. Business Travel News named him a 2004 Best Practitioner and the 2007 International Travel Manager of the Year.

CHRISTIE HICKS

Former Starwood Hotels & Resorts senior vice president of sales

"When I see where my team has ended up, many of whom are in very significant leadership positions at lots of different companies, that's the impact that I think I had, and I'm so grateful for that opportunity."

A sales management and business leader who is widely respected for her ability to create beneficial relationships, gain consensus from disparate parties and define complex strategy on a massive scale, Christie Hicks possesses deep cultural sensitivity and hospitality industry expertise. Christie assembled, led and mentored top-performing global sales teams in driving billion-dollar revenues. She is known as a risk-taker, accurately predicting upcoming trends and anticipating changes in consumer behavior.

During more than 30 years in hospitality with oversight of all markets—group, leisure and business travel—Christie has been involved in many industry organizations and worked with clients from around the world but is most proud of the team she worked with and how they have all become strong leaders throughout the industry.

She led a global team until her retirement from Starwood in March 2015. Since leaving Starwood, Christie has spent time consulting in hospitality and in senior living. She is a board member of Maritz Holdings and remains a mentor to many of the team she helped create.



SIR MAURICE FLANAGAN

Former Emirates executive vice chairman

In 1953, Maurice Flanagan joined BOAC, the forerunner of British Airways, as a graduate trainee, after serving in the Royal Air Force as a navigation officer. He ascended through overseas posts to area manager level, returning to the United Kingdom in 1965 as a route planning manager. He joined British Airways' senior management team in 1974. In 1978, Sir Maurice left British Airways to become Director and General Manager of Dnata, the forerunner of Emirates and now its sister company. He became Managing Director of Emirates when the airline began operations in 1985 and was appointed Group Managing Director of the Emirates Group in 1990. He became Vice Chairman and Group President in 2003 and was appointed Executive Vice Chairman in 2006. Maurice was made Commander of the British Empire in the Queen's Birthday Honours List in 2000, in recognition of his contribution to community relations in the UAE and services to aviation. Maurice was inducted into the British Travel Industry Hall of Fame in May 2005 and the Centre for Asia Pacific Aviation Hall of Fame in 2007. In 2010, Maurice was appointed Knight Commander of the Order of the British Empire. Sir Maurice retired from Emirates in April 2013 and passed away in May 2015.

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Business Travel Hall of Fame Class of 2019, from left: inductee **Ralph Colunga**, Emirates USA regional sales director **Joel Goldowsky** (inducting **Sir Maurice Flanagan**), inductee **Christie Hicks** and inductee **Reggie Aggarwal**

BUSINESS TRAVEL HALL OF FAME SCHOLARSHIP RECIPIENTS



Left to right: American Express Global Commercial Services global client group vice president **Emily Lewis**; American Express Global Commercial Services Scholarship recipient **Merril Guzman**, who will graduate this year with an M.S. in tourism management from the Jonathan M. Tisch Center of Hospitality at New York University; Dan And Gloria Bohan Foundation Scholarship recipient **Rebecca Rodriguez**, who graduated in December 2019 from Penn State University with a B.S. in hospitality management; Omega World Travel CEO **Gloria Bohan**; Bohan Foundation scholarship recipient **Susan Kang**, who will graduate this year with a B.S. in hospitality management from Penn State; United Airlines Dave Hilfman Scholarship recipient **Madeline Aardema**, who will graduate in 2022 with a B.S. in hotel and tourism management from the Tisch Center at NYU; and United Airlines senior vice president of worldwide sales **Jake Cefolia**.



Coupa Software Acquires Yapta

Business spending management platform Coupa Software has acquired business travel price assurance technology provider Yapta, adding it to the company's travel and expense management technology portfolio. The companies did not disclose the terms of the deal, which has been finalized.

Yapta will now be marketed as Coupa TravelSaver for Airlines and Hotels, respectively, according to James Filsinger, who served as president and CEO of Yapta prior to the acquisition and will continue in a leadership role with Coupa. His new title is to be determined, according to a Yapta spokesperson.

Yapta has made significant inroads in the corporate travel space with its FareIQ product for air and RoomIQ product for hotel, which search and re-book—in some cases, automatically—trip elements at lower prices, while maintaining the travel product expectation for the user. Its competitors in the space include Tripbarn on the hotel side and Fairfly for airfares. Yapta has been named to Deloitte's Technology Fast 500 for the past three years.

Travel management companies have rolled out their own versions of price assurance technologies. In November, the company claimed 30 TMC partners that either distribute Yapta products or use Yapta technology under the hood of their own solutions. Yapta also said at that time it had 8,500 corporate clients in 46 countries, including half of the Fortune 100. It's website lists ABB, Amazon, Ford Foundation, National Basketball Association, Shell Oil and the Taylor Corporation among them.

"At least initially, there will be no day-to-day changes for Yapta's current customer base or distribution partners," according to Filsinger. "They will



"The time was right ... for a variety of reasons, including the historical success of Yapta, the lifecycle of the company and overall macroeconomic conditions."

—JAMES FILSINGER, FORMER YAPTA PRESIDENT AND CEO

continue to see the savings they've come to expect and will continue to interact with the Yapta—now Coupa—team with any questions they might have and to drive greater efficiencies for their programs."

How Coupa will integrate the Yapta technology into its product portfolio will be watched closely. Coupa currently provides features for travel spend management; it offers pre-trip expense calculator and approval technology, and, according to the website, the company "integrates with best-in-class travel and expense management solutions and all major corporate cards so that travel spend flows effortlessly into Coupa." A 2015 acquisition of TripScanner powers an email-parsing technology that captures travel spend from email itinerary confirmations, similarly to Concur TripLink and Traxo.

As a business spend management company, Coupa competes directly with SAP Ariba, which SAP integrated with its Concur and Fieldglass products into a comprehensive "Intelligent Spend Group" in May. SAP Concur chief product strategy officer Mike Koetting spoke to BTN last summer about the advantages of that broader focus, citing Concur's well documented willingness to manage travel spend outside of its specific travel channel and the potential for the combined platforms to flex those muscles. "There may be more magic ... around the breadth of transactions that you can capture and the number of channels that you can capture and the amount of content you can touch," he said.

Whether the Yapta acquisition signals a larger strategic move toward travel spend management for Coupa remains to be seen. The opportunity isn't lost on Coupa CEO Rob Bernshteyn, who cited global annual business travel spend at "more than \$1 trillion per year" in a press statement and remarked on it as "one of the spend areas within a business with the least visibility and control."

According to Filsinger, Yapta's decision to explore a sale was driven by the company's ownership, which "felt the time was right to determine if there was an opportunity [for a sale] for a variety of reasons, including the historical success of Yapta, the lifecycle of the company and overall macroeconomic conditions." ■

Delta Plans Deeper Mobile App Integration with Lyft

BY MICHAEL B. BAKER

Delta is deepening its partnership with Lyft, with plans to integrate more features from the ride-hailing supplier into the Fly Delta app.

The first step of the expanded partnership, expected in 2020, would add touchpoints within the app for travelers to link their SkyMiles and Lyft accounts, through which they can earn miles during Lyft rides. The companies are exploring eventually introducing such features as enabling travelers to pay for rides with miles and "a dedicated premium Delta-Lyft experience at some of the busiest U.S. airports," according to Delta.

The Lyft partnership is part of Delta's plan to turn its app into a "digital concierge" that

is "the ultimate travel companion for all points of your journey, with an eye on expanding the convenience and value of using miles as a form of payment for services with Delta and partners," according to Delta CEO Ed Bastian. Another step toward that will be the planned introduction later this month of virtual queuing in the app, in which travelers would be notified when their specific seat, not just their flight, is boarding. Delta recently has added app features including integrated security wait times in some markets and pre-selected meals.

The app news was one of several technology-related announcements made by Delta this

month during the CES 2020 show in Las Vegas. The airline also announced:

- Delta plans to launch in the spring a new machine-learning tool for its operations teams. The platform will help Delta employees make decisions during major disruptions, analyzing such data points as aircraft positions and flight crew restrictions. It also will provide a "post-mortem" after disruptions showing how different decisions could have improved a response.
- Delta will test a new "parallel reality" experience at Detroit Metropolitan Airport this year. With it, passengers can scan their boarding pass near a digital screen and see customized information in their selected language as they walk past the screen, such as directions to their gate, boarding time and upgrade/standby status.
- Delta is working with Sarcos Robotics to test exoskeleton suits for employees that helps them with heavy lifting. The suits can enable employees to lift up to 200 pounds repeatedly over an eight-hour shift without strain or fatigue, according to Delta. ■



Survey: Companies Still Struggle to Determine Travel ROI

BY ADAM PERROTTA

Many organizations continue to struggle to calculate the return on travel and entertainment spending, according to a new survey, even as they identify it as among their biggest variable corporate costs.

Commissioned by SalesTrip and conducted by 3Gen Research in October 2019, the survey canvassed more than 500 senior finance leaders for companies ranging from 50 to 50,000 employees. Half of the companies were based in the U.S. and half in the U.K.

T&E spending was the expense category most often cited as a company's biggest variable cost—identified as such by nearly 27 percent of respondents, outpacing salaries by 1 percentage point. However, about 48 percent of respondents reported a lack of understanding of the return on investment for their organization's T&E spend.

That disconnect can be attributed to a lack of real-time visibility into T&E spending and siloed data sets creating a barrier between spending and revenue, according to SalesTrip. A whopping 87 percent of survey respondents at midmarket companies between 101 and 5,000 employees said their finance teams take more than a day to report on travel spending. Meanwhile, 60 percent of companies included in the survey don't have a single system of records that links travel and expense data to customer and revenue data.

Those conditions can leave companies to attempt to calculate ROI via an after-the-fact reconciliation process focusing solely on travel cost, often leaving the resultant revenue to fall by the wayside. Retroactive calculation also hinders managers' ability to predict ahead of time whether a



potential trip will be worth the cost in terms of revenue generated, the report said. Further, a lack of understanding as to particular employees' productivity means leadership has no basis to reward top revenue creators.

"If organizations were able to better manage, track and forecast spend according to business activity or purpose, business leaders will be able to evidence travel as revenue-generating ... [and] corporate travel would be widely considered as an enabler of business growth rather than a necessary evil," said Manoj Ganapathy, founder and CEO of SalesTrip.

Bridging the gap between T&E spending and resultant revenue long has been something of a holy grail. But new tech integration models of late have progressed toward that goal.

SalesTrip, a U.K.-based T&E management service delivered through customer relationship management giant Salesforce, has set its sights on CRM as the key node of intersection between spending and revenue. Emburse's Prosper tool takes a similar tack. But there are other approaches, including linking expense management platforms with booking systems and corporate credit cards. ■

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Apartment-Style Hospitality Providers Gain Funding

Austin, Texas-based The Guild, a short-term, apartment-style accommodations provider primarily focused on the business travel market, has raised \$25 million in Series B funding. One month earlier, apartment-style accommodation rental firm Domio announced it had raised \$100 million in Series B funding.

Venture firms Maveron, Convivialite Ventures and ATX Venture Partners participated in The Guild's round, as did RXR Realty, Corigin Ventures and Nicol Investment Group.

The Guild partners with real estate developers to convert entire floors in Class A apartment and office buildings into hotel suites. "We typically work in buildings with at least 250 units or more total apartments, and work with the owner to take 15 to 25 percent of those and operate them," Guild co-CEO and co-founder Brian Carrico told BTN. This model is also being used by such competitors as Airbnb for Work, Domio, Lyric and Sonder.

The Guild is available through global distribution systems, and business travelers can book via a corporate travel app or agency platform. The Guild currently operates about 800 units in Austin, Cincinnati, Dallas, Denver, Miami and Nashville, and plans to use the Series B funds to expand to six more cities through 2021.

Domio Scores

Domio's round was led by GGV Capital. The lead debt investor was Upper90, which also contributed equity. The funds, raised in August but announced last month, will be used for national and international expansion, as well as for increased staffing, according to the company. CEO Jay Roberts said he was aiming to increase Domio's share of corporate and group bookings. The company is in the process of hiring a North American sales manager. Domio also plans to launch a loyalty program during the first quarter of 2020. ■

CONTINUED FROM FRONT PAGE

Sex Trafficking Victims Sue Major Hotel Companies

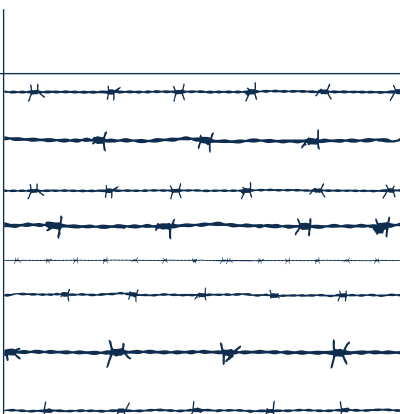
locations cited include Irving and Frisco, part of the Dallas-Fort Worth metropolitan area. This suit, too, demands a jury trial and the same type of unspecified damages as noted in the New Hampshire case.

New York law firm Weitz & Luxenberg filed a "motion for transfer of actions" in U.S. federal court in Columbus, Ohio, seeking to consolidate 21 existing multidistrict cases from Georgia, Massachusetts, New Hampshire, New York, Ohio, Oregon, Pennsylvania, Texas, Virginia, Oregon and Washington that are suing hotel companies on behalf of trafficked individuals. It includes the suit filed in New Hampshire. Consolidating would "prevent inconsistent rulings ... and overlapping pretrial obligations, reduce costs, and create efficiencies for the parties, courts and witnesses," according to the consolidation motion.

Additional hotel companies named in the consolidation request included Choice Hotels, Extended Stay America and Hilton, among smaller and hospitality management companies.

Human trafficking, particularly sex trafficking, long has been linked to the hospitality industry. About 75 percent of victims surveyed by human trafficking hotline operator Polaris in 2018 reported using hotels at some point during their trafficking.

The travel industry has made efforts to fight trafficking in multiple ways, including signing ECPAT-USA's Tourism Child-Protection Code of Conduct, known as The Code, which is a voluntary set of business principles hospitality companies can implement to prevent sexual exploitation and trafficking of children, and offering training to employees to identify the signs of human trafficking and how to report it if suspected. Several hotel companies named in these suits have signed The Code and offer human trafficking awareness training to their employees.



72%

of 164 travel buyer respondents were aware that human trafficking is an issue within business travel, and

40%

were aware of supplier efforts to train employees and raise awareness.

In a survey conducted last year by BTN, 72 percent of 164 travel buyer respondents were aware that human trafficking is an issue within business travel, and 40 percent were aware of supplier efforts to train employees and raise awareness.

"Hotels need to take this issue seriously," said Jennifer Keltner, a former travel manager who has spoken out against human trafficking for more than a decade and whose nonprofit, Rescue Party Give, draws awareness to the issue. "Hotels have to realize that more lawsuits are going to come out as these victims understand they might be able to get some form of compensation from the hotels. The pressure is on in different states to see what other states are doing on the issue."

Keltner added that hotels need to have protocols in place so guests who call in incidents feel safe and not at risk themselves. This also will help travel managers feel secure that a hotel did their part to address the situation.

"Human trafficking is a horrific crime that robs 40 million men, women and children of their freedom. Anyone who commits this illicit crime should be held accountable and prosecuted to the fullest extent of the law," said American Hotel & Lodging Association president and CEO Chip Rogers in a statement to BTN. AHLA has led the industry-wide campaign, No Room for Trafficking, launched in June, that is designed to train every hotel employee in the United States.

"Every major U.S. hotel brand along with thousands of independent hotels have already begun training their employees," according to Rogers. "As an industry we recognize the severity of this problem across the globe and are encouraged that more than a million hotel employees have already been trained."

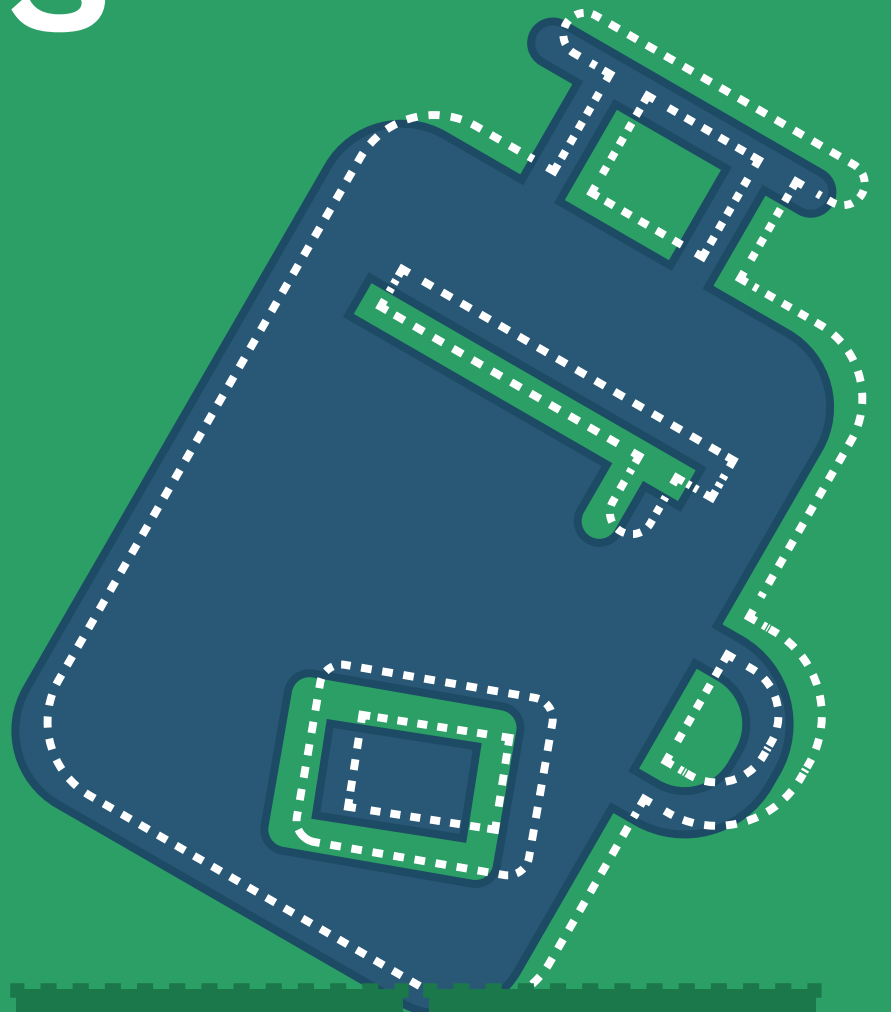
These lawsuits acknowledge that the hotel industry has begun to train employees on how to spot the signs of human trafficking but allege that it may not have started soon enough or that the companies are not enforcing their own policies.

Each hotel company named in the lawsuits in separate statements to BTN said that their company condemns all forms of human trafficking and offers their employees awareness training to help combat it. Many included franchises too. None would comment on the pending litigation. Weitz & Luxenberg did not respond to a request for comment. ■

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