

BTN

BUSINESS TRAVEL NEWS



ON THE HORIZON

Some changes to the hospitality business related to Covid-19 are permanent, say executives including Choice Hotels' Patrick Pacious.

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MEETINGS

AstraZeneca's Lauren LaMonaca joins a Meetings Mavens panel to discuss how to make sustainability part of meetings strategy.

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VOICES

The near-term future of airline bookings doesn't look as bleak as some might think, according to PROS chief AI officer Michael Wu.

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BTN's Most Influential 2020

Influence in a Grim Year

The year 2020 in the business travel industry will be defined by the Covid-19 pandemic and its effects, a fact reflected in BTN's Most Influential of 2020, a list that includes the government leaders, travel association heads, supplier executives and others who most directly shaped, for better or worse, the industry's response to the coronavirus. But the pandemic isn't the only event of 2020, nor is it the sole focus of BTN's annual assessment of influence, which includes the actors behind the year's biggest mergers, partnerships, expansions, lawsuits and initiatives. It also reflects the other theme of 2020: justice and injustice amid an awakening industry. It's been a year to remember and a year to forget, but an examination of the forces at work in 2020 can only help the industry prepare for, hopefully, a vaccine-powered return to the not-too-distant past of abundant global business travel. Here's to 2021.

FULL STORY ON PAGE 10

TRAVEL MEDICAL EXPERTS ASSESS THE COVID-19 VACCINES

Optimism and Restraint

Last month, Pfizer in collaboration with German firm BioNtech announced results of early trials of its messenger RNA Covid-19 vaccine. The company announced to the press—but not yet through peer-review journals—a 90 percent effective rate for the vaccine, which was far beyond industry expectations. The vaccine has limitations in the way it is produced and that it must be stored at extreme subzero temperatures. Pharmaceutical firm Moderna afterward announced similar efficacy rates for its own mRNA-type Covid-19 vaccine. Neither Pfizer nor Moderna has made holistic data available to review, but two trials with similar efficacy results bodes well for paving a pathway out of the Covid-19 pandemic, and the U.K. this month became the first country to approve the Pfizer vaccine for use. BTN editorial director Elizabeth West separately spoke with three senior

medical officers at travel risk, safety and security firms Global Guardian, Healix International and International SOS to get their reactions. Only the Pfizer vaccine trials had been announced at the time of the discussions, but some executives also spoke of upcoming drugs from Moderna and other pharmaceutical companies.

WHAT IS YOUR FIRST-BLUSH REACTION TO PFIZER'S EARLY RESULTS FROM ITS COVID-19 VACCINE TRIALS? Global Guardian medical director Dr. Shelly Weisenfeld: I heard about it first, much like everyone else did, via a CNN newsflash. Initially with the 90 percent success rate, there was immediate cynicism. I'm still in academia. It really matters what the data shows. Recognizing it wasn't peer-reviewed seemed like a false advertising. I need to see the data, and it's not substantiated until it's

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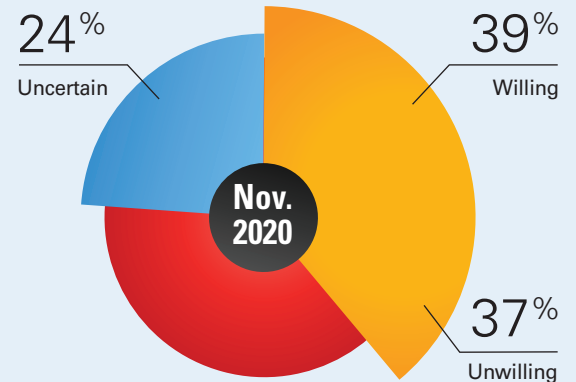
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Business Travelers' Willingness to Travel

Domestic travel for business purposes, next 90 days, if asked by company



A Heartfelt Thanks

In a year full of unexpected headwinds, Southwest[®] Business still has much to celebrate. We've increased our content and participation with Travelport and Amadeus, and our Heart is still growing with 10 new destinations, including Chicago (O'Hare), Houston (Intercontinental), and Miami. We introduced the Southwest Promise, our pledge to support the well-being and comfort of our Employees and Customers from check-in to deplaning. With that same goal in mind, our dedicated Team of Southwest Business Account Managers are here to support you and your travelers every step of the way.

On behalf of the Southwest Business Team, whose tireless leadership is the reason for our collective success, I would like to thank BTN for honoring me as one of the 25 Most Influential People in Business Travel for 2020 for the second year in a row. As the world continues to change, our hardworking Team remains committed to bringing Southwest[®] Heart to Travel Managers, Agency Partners, and our Business Customers. We hope to see you onboard soon.

Sincerely,



Dave Harvey
Vice President, Southwest Business





Hospitality Execs: Some Mtgs. Changes Permanent

BY DONNA M. AIROLDI

Group business is key to a full recovery of the hospitality industry, but when that will happen remains an open question, according to hospitality executives speaking at two sessions at last month's New York University International Hospitality Industry Investment Conference. They also weighed in on which changes to meeting protocols that Covid-19 has ushered in are temporary and which may be permanent.

"Large groups have got to come back," said Wyndham Hotels & Resorts president and CEO Geoff Ballotti. "This cannot be a permanent change. We are seeing [small meetings] with 100 or 200 attendees, but when will the meetings with thousands of attendees come back is the question. An important reason it has to come back is because of the impact on our team members. ... The industry estimates that anywhere from one-third to one-half of the 4 million people who have been laid off rely on those large meetings and conventions, they rely on the banquet and catering. We as an industry need to figure out a way for these large groups to come back so this is not permanent."

Starting with the return of small groups with hybrid meetings is easier to manage and test more efficiently, said Choice Hotels president and CEO Patrick Pacious. "We're kidding ourselves though if we think it will come back in the same way [as before]," he said. "You have to look at all the investments businesses have made in virtual private networks, in Zoom, in Microsoft Teams. CFOs around the country will say, 'We made this investment, do we really need to send people out to these long meetings?' On the margins, you'll see when business travel comes back fully, some of it may not return. We as an industry need to be thinking about it and figuring out how to adapt the assets we have to attract the business traveler of the future, but also looking at the new normal."

Radisson Hotel Group CEO of the Americas Jim Alderman noted Amazon's announcement that the company since the beginning of the year had saved nearly \$1 billion in travel expenses because of the pandemic, and it reported a third-quarter profit of \$6.3 billion, up nearly 100 percent year over year. "[Executives] will start to question the \$500 flight, the time to the airport, the travel time, the hotel at the other end," he said. "Is it worth a couple thousand dollars for a 45-minute meeting? Because we've become very good at this telecommuting. We've adapted. We have better cameras, better sound, and we are used to it."

Alderman added that Radisson has had some hybrid meetings at its hotels, and small in-person meetings in the few large meeting spaces it has,



"We as an industry need to be thinking about it and figuring out how to adapt the assets we have to attract the business traveler of the future, but also looking at the new normal."

—CHOICE HOTELS' PATRICK PACIOUS

such as 25 people in a 10,000-sq.-ft. ballroom. "That's a good way to do it, but it's also quite a big waste of space," he said. "It's not the new normal, it's the current normal. But I do believe we will get back to these large group meetings. The pent-up demand is incredible right now."

Seeking Comfort

Business travelers need confidence to feel comfortable attending events again, and according to many industry executives, that won't happen until there is a widely available Covid-19 vaccine or more therapeutics.

"People won't travel or go to events unless there is confidence in the future," said BizBash chairman and founder David Adler. "We need to get a handle on on-site testing. The key is to get the costs lower and make it the kind of test you can touch on your tongue and get instant [results]. From what I hear, those things are starting to happen. Big trade show companies are relying on that. China is coming back. We're seeing vibrant business there, with lots of people attending big shows, and they don't have major issues at the moment."

Adler added that "every event will have a medical team now. Attendees will go through a scanner for temperature taking. There are new ways to make the experience less difficult."

Executives also are assessing changing consumer behaviors and using that to determine which new meeting elements will remain in the future.

"When you look at consumer trends, people want more flexibility, they want health and safety standards, keyless entry—all those things will become normal," said Expedia Business Services president Ariane Gorin. "The consumer trend of wanting more flexibility will continue."

She added that hotels are investing in audiovisual and technology equipment to allow not only individual guests to work at hotels but also additional meetings connectivity, giving the example of in-person groups in multiple cities connected in a single hybrid meeting.

They're also making those investments because "broadcasting is very different than in the past," said NYC & Company president and CEO Fred Dixon. "It's not just a simple webcam. It's sophisticated TV broadcasting. And what is interesting is seeing engagement going up. The nice take-away is that we've reached larger audiences, and I hope that stays."

Convene Shuts Three NYC Sites

Still, even meeting venues with extensive tech capabilities must manage the reality of current demand. Convene closed three New York City locations in mid-October, the company confirmed. The spaces were at 780 Third Ave., 730 Third Ave. and 810 Seventh Ave. The three represented about 10 percent of Convene's locations, which now total 27 overall and 13 in New York, according to a company spokesperson.

Convene in June added a virtual meetings solution to support fully virtual and hybrid events, and in October, Convene added networking and sponsorship services to its virtual product. ■



Testing Times Bring New Lodging Trends

The current state of hotel demand and negotiating remains in flux amid the pandemic, with significant variance by hotel tier and location befitting the trends toward local drive-to business bookings. BTN Europe recently spoke with Alwyn Burrage, global hotel program director at U.K.-based multinational travel management company ATPI, who shared his observations and predictions for the hotel industry's outlook over the coming months.

WHAT IS DEMAND FOR BUSINESS TRAVEL ACCOMMODATION LOOKING LIKE IN THE CURRENT ENVIRONMENT?

With the Covid-19 pandemic showing little sign of slowing as we head towards 2021, the hotel market is finding it tough to find green shoots of hope. Demand remains low and unpredictable, but there are also some clear opportunities for both hotel operators and travel managers when it comes to planning ahead, like ensuring duty-of-care programs are fit for purpose and that you have the relevant technology tools and infrastructure in place. And if you look closely, there are sections of the industry that are finding creative and innovative ways to work in the new normal too, such as airport hotels including rapid Covid-19 tests in the price of a room stay, and new work-from-hotel packages for day use of rooms and meeting facilities.

WHICH BUSINESS SECTORS ARE THE MOST ACTIVE CURRENTLY?

In a number of markets, travel has not been massively curtailed—infrastructure projects, construction, the civil service, medical business, security personnel, oil and gas ... they have all continued to travel. Hotels that serve these sectors are seeing good, steady occupancy levels that, incredibly, have actually increased in some cases. Location is critical though and, for the foreseeable future, hotels outside of city centers are going to be increasingly important to operators.

HAVE YOU WITNESSED ANY UNEXPECTED TRENDS IN ACCOMMODATION USE?

Quarantine requirements and the need for testing facilities has actually been an unexpected business channel for some hotels. In the initial stages of the pandemic, accommodating testing units or allowing team bubbles to be formed across floors of a hotel was a business that hotels were unsure how to embrace. Fast-forward six months and hotels in the right places are pivoting quickly to make it easy for clients to use them as a quarantine and virus-testing location. In Australia, the likes of Melbourne's Hilton, InterContinental and Swissôtel were quickly transformed into state-run medi-hotels for mandatory quarantine for returning travelers.



ATPI's Alwyn Burrage talks:

- The state of the hotel RFP
- Why travel managers especially now should embrace loyalty programs
- Hotels' flexibility on amenities

"Hotel brands getting it right are seeing huge upswings in recruitment to their loyalty program, which has benefits for them in the long term."

ARE CORPORATES STICKING TO THEIR PREFERRED BRANDS, OR ARE FALLING RATES OPENING NEW DOORS?

The industries that are still traveling for business have traditionally favored budget hotels, but with room rates around the world on average around 25 percent down, many corporates are allowing travelers to upgrade while remaining within their travel policy. A silver lining of sorts. There are limited signs that senior executives are traveling for business, so luxury hotels are not exactly booked up, whereas midmarket chains have a lot of business coming their way, especially if they can recruit new guests into their loyalty programs for the long term.

WHAT IMPACT ARE LOYALTY PROGRAMS HAVING?

The extras that many loyalty programs offer, such as contactless check-in and a smartphone app which works as a room key, means that we recommend corporate travelers engage with loyalty schemes more than ever. These 'last mile' benefits have real tangible value when it comes to traveling as safely as possible. Travel managers also gain the reassurance that additional steps are in place to protect the well-being of their people. Hotel brands getting it right are seeing huge upswings in recruitment to their loyalty program, which has benefits for them in the long-term future, not least in driving brand preference and behavioral changes.

WE'VE HEARD A LOT ABOUT EXTENDING EXISTING NEGOTIATED RATES AS OPPOSED TO CONDUCTING FULL REQUESTS FOR PROPOSALS. WHAT ACTIVITY ARE YOU WITNESSING?

Running an RFP process takes time and resources, something that hotels do not have the luxury of anymore. With resources and budgets tight, they are keen to hang onto every possible booking and don't want to lose time renegotiating complex programs. The simplification of RFPs was a trend that we saw emerging pre-Covid and 2021 looks to feature deals as simple as a ceiling rate for the year with percent discounts applied across the whole of a hotel group's estate, including preferred properties that may have previously been excluded. The hotel market is under extreme pressure, so we expect this trend to continue as they [scramble] to gain as much share as they can of the available market.

ARE HOTELS OFFERING ANY VALUE-ADDED PERKS TO SWAY CORPORATES?

With occupancy down, there are opportunities for hotels to get innovative and clinch bookings. An increase in car rental for business travel, especially domestically, means hotels could offer parking in a room rate. Plus, flexible check-in and check-out times allow for travel outside of peak times and even space for corporate travelers to work from their hotel room for longer than a standard 11 a.m. check-out usually allows. While not game-changers, they are the kinds of services that are converting bookings and enhancing loyalty in a tricky climate. ■



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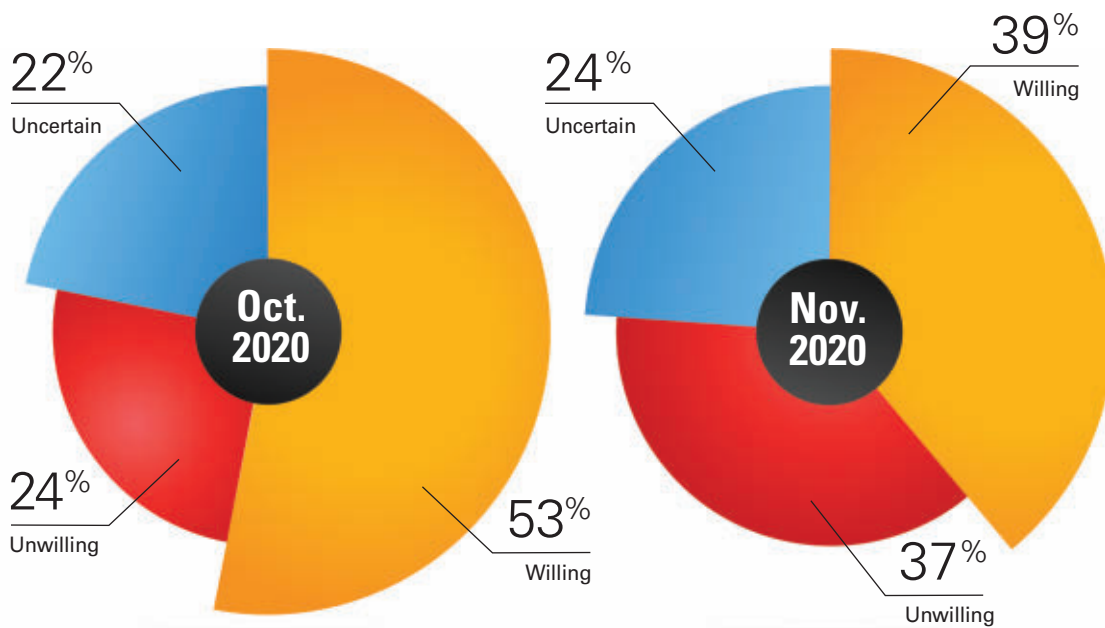


When Will Business Travelers Be Ready to Go?

With the dueling forces of an apparently effective Covid-19 vaccine release and the grim, record-setting U.S. spread of the coronavirus battling in the business travel industry's collective psyche, it remains unclear when would-be business travelers will be ready to hit the road. Meanwhile, a new report considers the steps suppliers could take to entice planners to hold in-person events, and the most recent Airlines Reporting Corp. data includes scant evidence of recovery.

BUSINESS TRAVELERS' WILLINGNESS TO TRAVEL

Domestic travel for business purposes, next 90 days, if asked by company



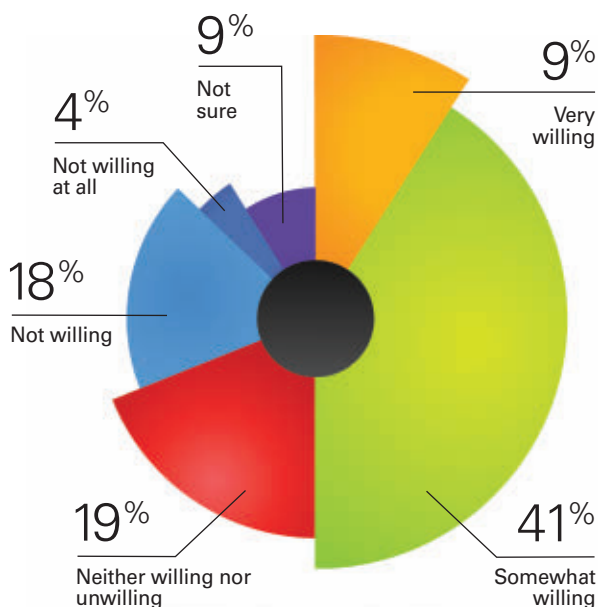
Source: Travel Again Nov. 17-19 survey of about 136 business travelers

52.2%

STR'S PROJECTED 2021 U.S. HOTEL OCCUPANCY, UP FROM 42.2% IN 2020

EMPLOYEES' CURRENT WILLINGNESS TO TRAVEL

According to travel managers



Source: Global Business Travel Association Nov. 9-16 survey of 376 travel managers and procurement professionals

INFLUENCING WILLINGNESS TO PLAN IN-PERSON EVENTS

Factors* that could affect North American meeting planners intentions

Favorable/flexible cancellation and attrition terms	78%
Confidence in duty-of-care components for attendee health & safety	66%
Supplier flexibility to adapt to the customers' meetings & events requirements	37%
Favorable rates and reduced fees	16%
Limited-time special offers	0%
Other	3%

*Other than Covid-19 restrictions. Respondents were asked to select up to two factors.
Source: American Express Meetings & Events 2021 Global Meetings and Events Forecast

ARC: LITTLE EVIDENCE OF U.S. AGENCIES' AIR TICKET SALES RECOVERY

7-Day Period Ending	Agency type, YOY change		
	Corporate	Online	Leisure/Other
Nov. 8	-85.7%	-54.3%	-69.1%
Nov. 15	-84.8%	-54.1%	-68.2%
Nov. 22	-86.0%	-60.4%	-72.1%
Nov. 29	-85.2%	-61.0%	-72.1%
Year to date	-70.59%	-53.83%	-62.14%

Source: ARC

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Margaret Brady

Liz Dodson

MAKING SUSTAINABILITY PART OF MEETINGS STRATEGY

Some organizations have used the Covid-19-related pause in business travel and meetings to reassess their programs, including sustainability elements. BTN's Donna M. Airoidi spoke with MMB Insights managing partner **Margaret Brady**, BCD Meetings & Events global account director **Liz Dodson**, AstraZeneca procurement director of global meetings and events **Lauren LaMonaca**, and Troop founder **Dennis Vilovic** at this month's BTN Strategic Meetings Summit America about how to make sustainability part of meetings strategy. The following has been edited for clarity and length.

HOW DO YOU DEFINE SUSTAINABILITY, OR AS IT'S NOW OFTEN CALLED, "ESG"—ENVIRONMENTAL, SOCIAL AND GOVERNANCE?

LIZ DODSON: There is a lot of talk about carbon credits and reducing plastic use. But every company sets up their own sustainability goals and ways of tracking that. We partner closely with our clients to help them understand how their corporate goals can be built into and interpreted into a meetings environment and how to incorporate that into their policies.

MARGARET BRADY: Most corporations have sustainability officers, and are reporting on sustainability and carbon emissions. It is on your CEO's agenda. As it evolves, and you start looking at ESG, in social you have duty of care, and you also have user experience, which really plays into travel. People often think it's just about measuring emissions, but the scope of ESG is far broader.

TELL US ABOUT THE STEPS YOU'RE TAKING TO INCORPORATE SUSTAINABILITY INTO MEETINGS AND EVENTS.

LAUREN LAMONACA: AstraZeneca CEO Pascal Soriot made a bold announcement over a year ago saying [the company] would be net carbon neutral by 2030. Flights, and finding the most logical place for sales reps to meet, are a given. We [also] are looking at things on a granular level, such as, now that we are doing virtual meetings and sending boxes to sales reps across the country, how do we make the packing material and the boxes biodegradable? Also, production: When we ship an 80-foot jumbotron TV to a location, are we sourcing it from a logical place, so we are not running tractor-trailers across the country? We also are bundling all materials and including meeting materials in sales reps' drop shipment packages.

WHAT ABOUT MEASUREMENT AND ESTABLISHING A BASELINE?

BRADY: I think there is a gap. You have to

measure what matters, and to improve, you have to measure. It's an imperfect science. The airfare seems to be the easiest. But [you also need] hotel, car, ground and taxi. If you talk to scientists, you are looking at mobility, energy, climate and water. So understand recycling and what kind of energy the hotel uses. What kind of building certification do they have? Having that criteria is important in your requests for proposals. There is a lot of work still to be done in this area, so people come up with creative ways of setting their baseline measurements.

HOW DO YOU ESTABLISH THAT BASELINE?

BRADY: There are a lot of new companies. Thrust Carbon just won the [2020] BTN Innovator [of the Year] award. There are agencies, there are partnerships out there that will work with you to help you measure your carbon emissions. But I think we need to get it so it's more fluid in the ecosystem. I look at sustainability metrics as being the same as any other travel data element, and we are not there. I go back to [companies] having a sustainability officer who probably already has a sustainability partner and program. That is where you should align in your company, and then start to build out your solution so it reports back through the organization. The other thing is carbon emissions ... it's getting more and more focus. If you look at Europe, France is [saying] you won't be able to fly if the flight is under three hours.

LAMONACA: We are trying to leverage the Covid effect now, and instead of bringing everybody together to big conference centers in Orlando or Las Vegas, we are hoping we can create a pod-type environment and have sales reps hop in their hybrid vehicle, drive a couple hours to a meeting venue, and we'll connect everybody in their pods across the country virtually. We can have people be more efficient, and we're also positioning this as a work/life balance play.

TROOP HELPS WITH THAT, IN FINDING THOSE SUSTAINABLE LOCATIONS.

DENNIS VILOVIC: We are a technology company, a data company, and what we do is aggregate different data points to help you to make an informed decision on where is a good place to have a meeting. We compare all the data points relevant for travel for different cities, different locations within a city, then follow methodology, which looks at what is called the four S's: safety, which obviously right now with Covid is a key thing, service, savings and sustainability, which in our definition is the carbon footprint. Let's say, "What is the impact of your transport options of your air, car, whatever it is?" Your transport makes its own carbon emission in different locations. And the second part of sustainability for us is traveler well-being. How can you avoid unnecessary travel time?

HOW ELSE CAN TECHNOLOGY HELP WITH MAKING MEETINGS MORE SUSTAINABLE?

BRADY: People can communicate using collaborative technology without traveling. And obviously business is getting done, and every CFO is saying, "Wow, I saved a lot of money, and we are still working." How we go back to [travel and meetings] needs to be smarter.

LAMONACA: We've proven we can work virtually and launch products without a big fancy launch meeting. Our senior leadership team is still saying, "Yes, there is always that intrinsic value of bringing people together." How do we do it in a smarter and better way? We are trying to figure out what that looks like.

ARE YOU INCORPORATING SUSTAINABLE PRACTICES INTO MEETINGS POLICIES?

DODSON: We've seen a lot of customers thinking about it. They were on their way toward that before the pandemic and had to pause and shift and refocus. But I think most of our customers see the value in taking this time and looking at their policies and making changes. It's coming.



Lauren
LaMonaca



Dennis
Vilovic

VILOVIC: Travel policy on sustainability is massive. Potentially the easiest way to increase your sustainability efforts is by increasing the [premium-class flight] upgrade mechanism by one or two hours. Some may not like that, but it's a concrete example of how you can have an impact.

IF NOT IN POLICIES, WHAT ELSE CAN BUYERS DO?

BRADY: In supplier RFPs, look at their way of catering. Is it seasonal and local foods? What is the hotel's policy on waste, on recycling? What is their energy? Are they Leed-certified? It is really important that you ask suppliers to be accountable, to provide those metrics so you can make more informed decisions. Then, make it a business requirement when you evaluate who you do business with. Some companies have programmed [their booking tool] to say, "This is not CO2-friendly." [The tool] blocks anything that is CO2-unfriendly and gives only the other options.

VILOVIC: We are seeing over the last couple of months that a lot of companies do not have proper meetings programs. They now realize they have to organize their meetings programs, because they cannot just let their people plan their meetings and go anywhere they want. They are utilizing this time to bring their meetings program in and add this sustainability component on top. Some of our customers, for example, pay their license fee through their sustainability budgets, which is quite an interesting development.

DO YOU SEEK SUPPLIERS BASED ON SUSTAINABILITY PRACTICES, AND HOW DO YOU VET THEM?

DODSON: At the individual property level, we've built a scorecard system that our customers can use to select the areas they are most interested in focusing on in evaluating venues, then we incorporate those questions into their standard RFP for each meeting. [In addition to space, price and sleeping rooms], they can also look at how many of our sustainability criteria [properties] met and make educated decisions there. It's important to track and report across individual meetings and to get that high level of data as well.

BRADY: Then share it. [Let travelers know] we are using vegetarian food, we are using local produce, things like that. As you recruit talent, people get inspired by that; they want to do the right thing.

DODSON: Beyond the venue scorecard, we're developing a meeting scorecard, because there are things outside the venue that impact sustainability. A winning approach is to have a competitive environment where meeting owners have the pride of saying, "I

have a gold-level sustainable meeting, Will your meeting be as good as mine was?" To do that, you need those consistent criteria so each meeting is measured in a very similar way, then have that positive reinforcement. Then, the more likely you are to actually get change adopted by meeting owners, and the people who are paying the bills.

WHICH STAKEHOLDERS DO YOU WORK WITH TO GET BUY-IN FOR YOUR SUSTAINABILITY EFFORTS?

LAMONACA: The initial announcement came from the top down, but in terms of the how, that was something we had to figure out, and we are closer to the meetings and the details than anybody, so this really is bottom-up. I am from the procurement function, so we have an internal support team there that is all around supplier sustainability, and our definition is very similar in the broader sense of, "How does it also include environment, and how do we make sure we have different perspectives?" I work very much with that group. We work with our policy, our compliance team; we work with human resources.

DODSON: It has to start from the top down, setting the tone and setting the policies, but you have to partner that with really strong education from the bottom up. Explain why you chose to have a meeting in a certain city or a venue because of their sustainability targets. Have those reps understand why they have to wait 20 minutes at the airport for a group transfer instead of an individual car. The meeting owner needs to understand why it's important to have certain types of menus, and attendees need to understand why they are not getting a steak dinner every night. It's really an across-the-board engagement, because meeting owners are driven by satisfying their attendees. Meeting owners also want to satisfy their senior leadership. Because, bottom line, the person with the budget is the one that makes the decisions. And if the person with the budget and the meeting owner choose to do something a certain way and policy allows that to happen, then they can make the choice to not necessarily follow the sustainable criteria.

BRADY: One of the things you'll see in the analytics when you start measuring is that you create leaderboards just like you do in travel policy compliance. You can see who is performing and who is not. And if you bill back carbon emissions and their P&L has to absorb that cost, they pay attention.

WHAT ARE SOME OTHER ACTIONS COMPANIES ARE TAKING REGARDING SUSTAINABILITY?

BRADY: I know a U.S. company that is doing a program with gamification at the point of

sale where they flag the eco-friendliness of your choice when you book, and every time you pick a more sustainable option, you get points. You can [redeem points] and plant trees or give to a charity, and the user gets to decide that.

IT COMES BACK TO COMMUNICATION.

LAMONACA: Education of those impacted by our sustainability decisions is crucial because their perception sometimes isn't reality. In my example where we do drop shipments to sales reps, we got pushback. They had no idea that the corporate rate we got [made it] cheaper for us to use FedEx overnight when we did the emissions calculations. It was not only a cost play, it was a sustainability play. We made a video and posted it on our internal social media platform. We talked about the facts and figures and said, "This is why we chose this packaging. This is why it came to you overnight."

DODSON: It's also super-important to make sure all your vendors and suppliers are educated and can speak to it as well.

VILOVIC: On our side, it's a lot about raising awareness. [With our technology,] even if you know where to go, you still get the results of alternative cities, then it's just a question of, is it really necessary that you have that meeting in that location? If you would move it, maybe then you could save on costs or on your carbon footprint.

WHAT ARE SOME OF YOUR BIGGEST CHALLENGES IN GETTING SUSTAINABILITY ADOPTED?

BRADY: Getting information down to the user level. Putting it in point of sale. Being able to get info on hotels. Buyers, ask suppliers to report and account for what they are doing. Call them out and give them credit for doing the right things. Partner with those people.

LAMONACA: Along those lines, having it truly be measurable. Another challenge is that we put a lot of policies in around food and beverage prior to Covid. We feel like we are going to go backwards once we start traveling again, because buffets are being eliminated, and there will be more individually packaged meals. That is a challenge we are facing, and I don't have an answer for it.

DODSON: Translating corporate goals into the meetings environment is a challenge because of the difficulty in measuring. That doesn't mean you should throw it out; you should still be working out the right way to do it, then partner that with education. Getting to the right people and helping them to understand the goals and adopt those are the key challenges we are seeing. ■

25

BTN's Most Influential 2020



Capacity Capper

CEO, DELTA AIR LINES

ED BASTIAN

As much as airlines are banking on science to get passengers in the air, they still will need to clear the obstacle of perception.

In the early months of the pandemic, several carriers capped capacity to ensure passengers would not be seated next to each other. Those carriers that did not at times found photos of their nearly full flights posted on social media.

Delta Air Lines was the only carrier among three largest U.S. carriers to maintain its capacity cap beyond the summer, pledging to keep middle seats open to avoid having passengers not traveling together sit in adjacent seats. United Airlines in May, rather than cap capacity, instead introduced a policy to notify passengers on fuller flights in advance to give them a chance to change flights if they wished, and American Airlines in July removed capacity caps in favor of a similar policy.

In the fall, after studies emerged showing a relatively low risk of in-flight transmission due to such factors as mask requirements, high-grade filtration systems and airflow direction, most carriers with capacity caps have either ended them or plan to phase them out in early 2021. As carriers fight to end cash burn, some have said it would be nearly impossible to do so with those caps in place.

Delta CEO Ed Bastian, however, has pledged to continue Delta's policy of blocking middle seats until at least the end of March 2021, which should leave it the last of the major U.S. carriers with the policy. The carrier's executives have said that will be a key measure in restoring corporate travel demand.

"I'm in regular contact with our corporate partners, and we are hearing that, besides the guarantee on cleanliness, the space and distance onboard the aircraft is the second-most important thing to them as they consider business travel again," Delta chief customer experience officer Bill Lentsch told BTN in June. "We are not going to violate that 60 percent cap. We have our revenue management team, operations center and airport team working hand-in-hand daily, monitoring flights and making sure we do not violate that cap."

—Michael B. Baker



The Deal Breaker

CHAIR, U.K. COMPETITION AND
MARKETS AUTHORITY INQUIRY GROUP
MARTIN COLEMAN

When global distribution system provider Sabre announced in 2018 its intention to buy Farelogix, a company whose technology airlines could use to bypass GDSs, it was safe to assume competition authorities would investigate. Less easy to foresee was that the deal would be blocked in 2020 not in the two companies' home country, the U.S., but by the Competition and Markets Authority of the United Kingdom. Farelogix does not even have any direct customers in the United Kingdom.

"The products and services that Sabre and Farelogix provide ultimately affect many passengers flying in and out of the U.K.," said Martin Coleman, who led the probe into the merger for the CMA, in his decision. "The two companies are helping drive technological change in this industry and we are concerned that the merger will see airlines and their UK passengers miss out on the benefits from continued innovation. ... In this case the evidence of harm is clear."

Sabre accused the CMA of "acting outside the bound of its jurisdictional authority." To rub salt into the wound, the decision from across the Atlantic came almost simultaneously with legal success at home when a federal court rejected the U.S. Department of Justice's attempt to stop the merger.

Miffed as Sabre and Farelogix might be with Coleman, some observers believed the former head of antitrust and competition at law firm Norton Rose Fulbright had inadvertently done both parties a favor. Although it had to pay Farelogix up to \$25 million because the deal collapsed, consummation of the agreement would have seen Sabre handing over \$360 million of cash at a time when coronavirus had devastated its income.

As for Farelogix, just weeks later a new buyer swooped in: airline back-office technology company Accelya. The new suitor gave Farelogix the expanded resources it sought while perhaps allowing a better relationship with lead customers American Airlines and United Airlines, which had both opposed the Sabre tie-up.

Meanwhile, Coleman's brief but momentous brush with travel technology is not yet played out. In spite of Farelogix disappearing into the sunset with Accelya, Sabre appealed against the CMA decision. The appeal was heard in November and a determination is imminent.

—Amon Cohen

The Barrier Builder

GOVERNOR, FLORIDA

RON DESANTIS

When the dreadful consequences of the Covid-19 pandemic in the United States first became apparent in the Northeast in March, Florida Gov. Ron DeSantis responded to the shelter-in-place orders issued in locales like New York City not with a shutdown of his own, but with an executive order requiring a 14-day quarantine of all residents of New York, New Jersey and Connecticut entering his state.

It was a decision that quickly would be adopted by governors throughout the U.S., with some states reaching the point as the virus spread that they had quarantine orders for nearly every other state. It also had a significant effect on business travel, according to suppliers and analysts, with some would-be travelers willing neither to quarantine nor to violate their state's executive order.

DeSantis, a Republican, in announcing the March 23 executive order noted that breaking it could carry criminal penalties, and that travelers would be met by local or state law enforcement. It doesn't appear that anyone, at least in the contiguous 48 states, has been prosecuted for breaking their state's quarantine. But, according to analysts, the psychological barrier of intrastate travel quarantine orders remains, even if the threat of prosecution has proven a paper tiger.

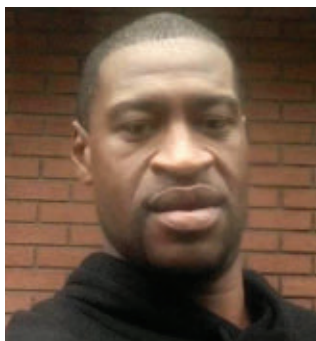
"Recent booking trends suggest that a patchwork of domestic quarantine restrictions recently imposed by various jurisdictions are suppressing travel and leading to a rise in cancellations," Deutsche Bank airline analysts as early as July 13 wrote in a research note.

There also has been some evidence that some organizations have directed their would-be travelers to respect the orders by staying home or honoring the self-quarantine.

The drag on demand doesn't appear to end anytime soon, at least until recently unveiled Covid-19 vaccines receive widespread distribution, as the coronavirus spreads in the U.S. at a record-setting pace. As for DeSantis, he quietly rescinded in August the executive order on New York, New Jersey and Connecticut; those three states, who in late spring had instituted their own orders regarding arriving travelers from Florida, did not return the gesture.

—Chris Davis





Outcome of Injustice

BLACK MAN

GEORGE FLOYD

Before 2020, when did you participate in a managed travel conference that talked about racial inequality, much less racial injustice?

When George Floyd was killed on the streets of Minneapolis this summer, he was elevated to a symbol that represents a long line of racially motivated crimes, injustice and inequality that includes far too many Black victims. But symbolism also diminishes—it threat-

ens to sublimate Floyd's flesh-and-blood humanity in service of a concept. Our collective conscience never should separate humanity from Floyd or any victim of the much-too-deep legacy of systemic racism. Floyd's final words, "I can't breathe," gasped from his throat beneath the knee of white Minneapolis police officer Derek Chauvin, have become a rallying cry for social injustice.

Black Lives Matter protests reverberated loud enough this summer to reach the ears of travel companies. American Airlines allowed BLM pins to be worn by employees until it could develop an official pin. The airline held back official support for BLM. Delta raised a BLM flag at its headquarters. In a memo to employees, Delta CEO Ed Bastian revealed inequalities in the ranks of that company, and he pledged to do better. Marriott executive chairman J.W. Marriott Jr., CEO Arne Sorenson and chief diversity officer David Rodriguez decried racism in a similar statement and implicitly aligned the company with Black Lives matter, "We believe that the lives of George Floyd, Ahmaud Arbery, Breonna Taylor, Rayshard Brooks and countless others matter and were lost to a society where pervasive racism exists. We believe racism should be eradicated."

Travel managers have told BTN they will look for more than statements as they establish travel program partners. Industry group Travel and Meeting Standards (see Susan Lichtenstein, page 17) has formed an equity committee to determine metrics for assessing partners on diversity competency. Suppliers say they're being pressed for diversity and equity information during the sourcing process. Without Floyd, these conversations would not be surging in this space. Must change come at such a human cost? As an industry, we should ask ourselves that more often, and move before it is answered in the affirmative.

—Elizabeth West



The Content Controller

VICE PRESIDENT OF DISTRIBUTION, AIR FRANCE-KLM

EMMANUELLE GAILLAND

For several years, large European airlines in particular have moved away from full-content deals with global distribution systems, and have levied surcharges on bookings made through GDSs. This year, Air France-KLM took another step in redefining the relationship among carriers, GDSs and travel management companies, signing a deal with Amadeus that allows the GDS access to the carrier's New

Distribution Capability-piped content, but only to those agencies that reach separate agreements with the carrier and the GDS.

Air France-KLM vice president of distribution Emmanuelle Gaillard in September contrasted the new deal with a typical "GDS-type agreement" in comments to BTN portfolio mate The Beat, in which the carrier group would "supply the fares, the schedules and the availability to the GDS, and they build our offer and they distribute to whomever they want. ... It's not at all that type of agreement."

Air France-KLM in July processed about 15 percent of its agency bookings via NDC connections, primarily through non-GDS aggregators like Travelfusion or direct connects. Under the terms of this deal, Gaillard said Amadeus users will be subject to a surcharge of "a few euros per segment, per passenger" to book Air France-KLM's NDC content, unlike the carrier group's deals with aggregators like Travelfusion. Unlike the private-channel deals it once negotiated to shield agencies from booking surcharges, under this deal, "we're not going to waive the [Amadeus NDC] surcharge for anybody," she said. The surcharge is there to cover our costs. That's very clear."

For Gaillard, the terms reflect the carrier's desire for control of its content. "We keep the control of our distribution network and our content—meaning we choose the agents we want to distribute NDC to," she said, "and we discuss and we agree [on] the content with them."

—Chris Davis



The First Masker

PRESIDENT AND COO, JETBLUE

JOANNA GERAGHTY

Early in the pandemic, to help reduce virus transmission, carriers mandated their in-flight crew and recommended their passengers wear masks or face coverings. On April 27, though, JetBlue became the first carrier to require all passengers to wear masks or face coverings during check-in, boarding, in flight, in terminals and when deplaning. The carrier based its requirement on the U.S. Centers for Disease Control and Prevention's guidelines and protocols.

"In the midst of this unprecedented pandemic, safety took on a new meaning," said JetBlue president and COO Joanna Geraghty.

Wearing masks on flights soon became an industry standard. By the end of April, United, Delta and American implemented their own mask requirement policies. "This is the new flying etiquette," said Geraghty. "Onboard, cabin air is well-circulated and cleaned through filters every few minutes, but this is a shared space where we have to be considerate of others."

By June, all major U.S. carriers agreed to step up enforcement of passenger facial covering requirements on flights. Many refused to allow passengers on their planes without face coverings or mandated they wear their face coverings throughout the flight. In August, JetBlue, for example, began a no-exemption policy, under which passengers not wearing facial coverings would not be allowed to board, and those who refused would be "reviewed for future travel," according to JetBlue.

The mask requirement has been essential to reassuring business travelers, as well as corporate travel managers, who've been keeping a closer eye on airline hygiene protocols. "The response has been very positive from the corporate travel community. Our corporate partners have shared that they appreciated JetBlue's early action to require masks and lead the industry," said Geraghty.

In the fall, the International Air Transport Association, Harvard University and the U.S. Department of Defense published studies on the risk of in-flight Covid-19 transmission. All found wearing masks throughout flights to be essential to reducing the risk of transmission.

Whether JetBlue will modify its mask requirement will depend on the ongoing public health situation. "So much will depend on the rate at which vaccines are made available to the public, the transmission rates of cases, and case counts," Geraghty said. The carrier is currently trialing CommonPass, a digital pass will enable travelers to use their mobile phone to show their Covid-19 test status.

—Dawit Habtemariam



Distribution Dealer

VP OF SOUTHWEST BUSINESS, SOUTHWEST AIRLINES

DAVID HARVEY

Southwest's agreements with Travelport and Amadeus to provide content and full distribution capabilities earned David Harvey, VP of the carrier's Southwest Business unit, a slot on this list last year. He returns as Southwest not only followed through amid the Covid-19 pandemic but also ended a long-standing agreement with Sabre.

Like all airlines, Southwest faced tough choices in terms of investment priorities this year as demand evaporated in the early days of the pandemic. Cutting the global distribution strategy, however, "one of the biggest technology strategy projects of the year," was not an option, Harvey said. "We made a commitment, so we got the teams focused and got this over the goal line. It would have been easy to say we were going to slow down, but actually, we decided to speed it up."

Southwest's content went live on Travelport's Apollo and Worldspan GDSs on May 1, ahead of its planned launch late in the second quarter, Harvey said. Travelport's Galileo GDS followed on July 1, and Southwest went live on Amadeus on Oct. 1. Prior to May 1, less than 40 percent of Southwest's content was available in the GDS. That had grown to 90 percent by mid-November and would be at 100 percent within weeks, Harvey said. Even with smaller corporate travel volumes amid the pandemic, Southwest has seen "a lot of incremental net new business" via the GDS connections, he said.

Southwest had been in discussions with Sabre for enhanced GDS participation as well, but the carrier in January announced those had ended without an agreement. In July, the carrier said it would end the bare-bones "basic booking request" model through which it had worked with Southwest for decades. The model had become an area of friction in terms of workflow for customers and the legacy technology it used, Harvey said.

While Southwest had hundreds of customers who were using that Sabre solution, the carrier "has put the finishing touches" with nearly all of them, ensuring that there would be no disruption when it officially ends at the close of 2020. In the meantime, the door remains ajar for a future content deal with Sabre, Harvey said.

"There's not a path forward in the short term as we get into 2021," he said. "Once we start to understand what recovery looks like and see how the marketplace responds, I think we ultimately want to provide an industry-standard solution with Sabre."

—Michael B. Baker



Defender of Trust

ATTY. GENERAL, NEW YORK

LETITIA JAMES

In February, the U.S. Department of Homeland Security banned New York residents from using the majority of its trusted traveler programs—Global Entry, Sentri, Nexus and Fast—which allow members to use expedited

security lanes at U.S. airports and expedited customs and border control lanes when crossing international borders.

While the DHS move did not apply to current TTP members as of February, about 50,000 New York residents who were conditionally approved for the program, along with 30,000 who had applied and were pending initial vetting, immediately lost their applications (along with the associated fees to apply). In addition, about 150,000 to 200,000 New Yorkers had Global Entry memberships set to expire by the end of 2020 and would have been unable to renew.

The agency cited the state's Driver's License Access and Privacy Act, which took effect December 2019, as necessitating its policy. The law allows all New Yorkers regardless of citizenship or lawful status to apply for a driver's license; it additionally prevents DHS and any agency that primarily enforces immigration from reviewing DMV data.

New York Gov. Andrew Cuomo and state Attorney General Letitia James, along with other officials, viewed the ban as politically motivated, citing more than a dozen states with similar laws that weren't singled out for removal from trusted traveler programs.

James swiftly filed a lawsuit against DHS, alleging violations of New Yorkers' right to equal protection and equal state sovereignty under the U.S. Constitution. She lashed the Trump administration for politicizing the nation's security apparatus.

In July, the U.S. Attorney's office in Manhattan noted in a court filing the prevalence of such laws and declined to defend the DHS position, stating the agencies "deeply regret the foregoing inaccurate or misleading statements" at the foundation of their argument. U.S. federal court vacated the policy in October, calling it "legally indefensible" but noting the agency would have been unlikely to acknowledge this had it not faced the "thorough, probing, in-depth review" brought by James' suit.

—Elizabeth West



"Quarantine Bingo" Caller

PRIME MINISTER, UNITED KINGDOM

BORIS JOHNSON

British international business travelers were introduced to a new game in summer 2020: Quarantine Bingo. Would the country they planned to visit be removed from the list of exemptions

from the U.K.'s 14-day quarantine requirement before they made it back home?

Prime Minister Boris Johnson's chaotic approach to controlling entry to the U.K. during the coronavirus crisis proved unpopular with the travel industry from the outset. The U.K. government introduced the quarantine from June 8, and critics accused Johnson of shutting the stable after the horse had bolted, suggesting a border closure at the outset of the pandemic would have made much more sense. They also questioned why exemptions were to be made for France only and for non-air passengers. Both were dropped.

By the beginning of July, the U.K. did exempt 59 countries deemed low-risk, but at the end of that month the U.K. axed Spain from its exemption list with six hours' notice. Quarantine Bingo was underway, with travelers rushing to get home to avoid self-isolation. The following week Luxembourg got the chop at short notice. The week after that came Andorra, then the Bahamas and Belgium, and so on.

Faced with such chronic uncertainty, Business Travel Association chief executive Clive Wratten, called the process "a mortal blow for our industry." Travel companies and associations also expressed frustration at no sector-specific financial aid to compensate, plus resistance to any initiatives for virus testing of passengers.

The U.K. at least is starting early on vaccination, which should help business travel recover in 2021, only to face another feature of Johnson's leadership: Brexit. Once the transition period ends on Dec. 31, U.K. travelers will need six months on their passport when visiting the European Union, will have no automatic right to stay beyond three months, likely will have to stand in immigration queues with other non-EU citizens, and in many cases will need an International Driving Permit if they use a car.

—Amon Cohen

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The Globalizer

PRESIDENT AND CEO, UATP

RALPH KAISER

For any supplier, unlocking the massive potential of the Chinese market requires serving travelers there on their own terms—especially when it comes to payments, with ubiquitous mobile payment services like Alipay, WeChat Pay and China UnionPay occupying central roles in Chinese consumers' personal and corporate payment lives. This year, UATP president and CEO Ralph Kaiser led the airline-owned payment network in making a major stride toward enabling air carriers to accept payment via those all-important channels, which collectively are used by more than 1 billion consumers.

In May, UATP signed a deal with Citcon, which specializes in providing acquiring and processing services for North American and European acceptance of Chinese mobile payment services. Under the alliance, Alipay, WeChat Pay and China UnionPay transactions—along with those of other payment providers—will run over the UATP network, so customers will see those mobile payment brands on any airline's merchant website and mobile app.

"The end customer will not notice the difference on the front end; they just see the payment brands they want to use, and UATP makes it easier for merchants to offer these brands to their customers," said Kaiser.

UATP, which entered the China market in 2007, made another major move in the Chinese payment sector in August, signing Air China, the country's flag carrier, to issue UATP payment cards.

Progress on both initiatives has been steady in the months since, despite the ongoing Covid-19 pandemic continuing to sow uncertainty in the global travel ecosystem, according to Kaiser, who was quick to credit the projects as team efforts conducted in concert with UATP's Asia and China market leadership. "Air China launched in August and has had very impressive growth in its first three months, with volume numbers far exceeding expectations," said Kaiser. He went on to note an "impressive recovery" in the China market at large, where overall payments volume on the UATP network was "running at about 80 percent of 2019's numbers" as of late November.

Meanwhile, UATP is in the process of recruiting air carriers to accept mobile payments via Citcon connectivity, while also continuing to expand its traditional payment presence in the market—where it counts several other Chinese airlines as issuer partners—in order to be well-positioned for what Kaiser anticipates will be a strong bounce-back in travel payments activity.

—Adam Perrotta

The Change Agent

CEO, UNITED AIRLINES

SCOTT KIRBY

Of all the permanent changes Covid-19 will leave on the airline industry, the elimination of domestic change fees stands to be one of the most profound in terms of shaping corporate travel policies.

While carriers already had suspended change fees during the pandemic, United Airlines—led by CEO Scott Kirby, who took over the chief executive job in the spring—was the first to announce that the change was permanent. On Aug. 30, the carrier announced a new policy in which travelers pay only the fare differential when changing domestic tickets, including travel to Alaska, Hawaii, Puerto Rico and the U.S. Virgin Islands, with the exception of Basic Economy tickets. United also announced it was making same-day standby free.

In a video message that went along with the announcement, Kirby said getting rid of those fees was one of the top requested items from passengers.

Delta Air Lines, American Airlines and Alaska Airlines all announced similar policies with a few days of United's announcement. That put the five largest U.S. carriers in unison on the matter, as Southwest Airlines never charged change fees in the first place.

Many buyers will need to re-examine such policies as advance purchase requirements when corporate travel begins to pick up again, particularly as they all now vary a bit by airline. American Airlines, for example, took the extra step of agreeing to offer credit for fare differentials when the new ticket is cheaper and, more recently, expanded its change fee exemption to cover long-haul international flights as well.

Of course, it remains to be seen if "permanent" truly remains permanent once airlines return to full flights and strong corporate demand. In his announcement, however, Kirby set the tone for a different approach to recovery than previous downturns, saying cost-saving measures that hurt the passenger experience would not be the default.

"As we emerged from previous tough times, we made difficult decisions to survive financially but sometimes at the expense of customer service either by adding new fees or cutting the things that made the experience of flying better simply because they were too expensive," Kirby said in his video message. "United Airlines won't be following that same playbook as we come out of this crisis."

—Michael B. Baker





Collaboration Guru

FOUNDER, TRAVEL AND MEETINGS SOCIETY

SUSAN LICHTENSTEIN

Little did DigiTravel Consulting managing partner Susan Lichtenstein know when she wrote a LinkedIn post asking for volunteers from the buyer and supplier sides of the industry to form a travel and meetings task force as a response to the effects of Covid-19 on business travel that the interest that post generated would turn into what is now a collaborative, independent grass-

roots society with about 2,500 members from around the world.

"It took off like crazy," Lichtenstein told BTN. "People liked that buyers and suppliers were working together, with no power plays or politics." Forty percent of the members are buyers, and 70 percent are women, she said. "Naturally, we didn't go looking for that; they said their voices weren't being heard."

Lichtenstein, a 2017 inductee into the BTN Hall of Fame, acknowledged that providing a collaborative environment takes work. "We know this because we've never had something like it before in corporate travel," she said. "We have to focus on that as part of our goals, then to educate and disrupt the business travel [industry] and take it to the next level."

As of November, TAMS—Travel and Meetings Society—had 11 active working committees: community and engagement, data, diversity inclusion and equity, finance, governance, innovation and disruption, mentoring, marketplace, sustainability, technology, and training and development. There's also a verticals team to make sure all industries within travel, like air, hotel and ground, are represented.

TAMS released its Standards of Safety in Business Travel document in early summer, with input from buyers, suppliers and consultants. It provided protocols across eight areas in three categories that represented the health crisis phases from most to least severe. Next came a communication guide to build a strategy to engage and educate travelers. In November, it released a diversity conversation toolkit.

In mid-November, Lichtenstein said a marketplace was about to open "where suppliers can have short videos and buyers can go in anonymously and reach out."

She added that she is proud and honored to be a part of TAMS and see it grow on its own. "We get new members every day," she said, and mentioned a full Google suite of available calendars, events, and papers. "All meetings are posted for the public," she said. "We have 100 percent transparency, not just to each other but to the public. That doesn't happen normally."

The society has been together for six months. "I learn so much every day," Lichtenstein said. "I've never seen anything move so fast and the work be so innovative and disruptive. It's not the same old training, or here's another [request for proposals] tool. That is not us. We are creating what is next. It's so important to give back to the industry, as well as have heart and soul."

—Donna M. Airoidi



Money Man

SECRETARY, U.S. TREASURY

STEVEN MNUCHIN

The near-total shutdown of business travel demand in 2020 put travel suppliers of all sizes in dire financial straits. There were casualties. Thousands of employees were laid off or furloughed, dozens of hotels and small travel agencies closed. But given how deeply demand was slashed, it's not hard to imagine a scenario in which outcomes were even worse, with large suppliers failing amid a collapsing industry.

That such a scenario hasn't happened is due in part to the financial support delivered by the federal governments in many countries to their business travel suppliers. In the U.S., that aid was authorized by the Coronavirus Aid, Relief, and Economic Security Act, better known as the CARES Act, which along with other mechanisms that allowed travel suppliers of all sizes to access the funding in some cases necessary to maintain staff and continue operations.

Key mechanisms authorized by the CARES Act include the Paycheck Protection Program, which authorized forgivable loans to suppliers provided they kept employees on the payroll, and the Payroll Support Program, an airline-specific mechanism that enabled carriers to tap billions of dollars in loans. Hundreds of industry suppliers tapped these and other programs to stay in business during a devastating year and position themselves to be ready when business travel begins to return.

But key provisions of the CARES Act expired Oct. 1, and suppliers have clamored for additional support. Congress and the Trump administration at press time have been unable to reach a deal on another round of support; it's unclear whether such a deal will happen before Joe Biden becomes president on Jan. 20.

Citing a single executive for the passing of the CARES Act is a thorny endeavor, given the agreement reached among the Trump administration, a Democratic House and a Republican Senate. Reports at the time cited Treasury Secretary Steven Mnuchin's role in persuading the Senate to pass a substantial relief deal by warning them of the potential economic ruin if they did otherwise.

—Chris Davis



The Border Locksmith

THE COMMONS PROJECT CEO

PAUL MEYER

For most of 2020, border restrictions and quarantines impeded the airline industry's recovery. "Governments reopening and then closing borders or removing and then re-imposing quarantines does not give many consumers confidence to make travel plans, nor airlines to rebuild schedules," International Air Transport Association director general and CEO Alexandre de Juniac said in September.

Enter CommonPass, a digital passport that certifies incoming travelers'

Covid-19 test status, providing governments a tool to safely reopen and manage borders. The digital passport was developed by Switzerland-based non-profit The Commons Project Foundation and the World Economic Forum, in collaboration with a coalition of public and private organizations, which include airports, airlines and government representatives from more than 50 countries.

The passport enables travelers to show to crossborder authorities and airline staff in a manner compliant with privacy regulations their Covid-19 test status on a scannable unique QR code on a mobile phone. "It verifies that a traveler has been tested, but it's not stored or conveyed to an airline or government," Commons Project Foundation CEO Paul Meyer said. "It complies with [General Data Protection Regulation] and the other data-privacy requirements."

CommonPass also is designed to serve as a global standard for crossborder authorities to use to screen passengers for Covid-19. Now, travelers demonstrate their Covid-19 status with a printed paper or photos of the paper from possibly unknown labs, without a standard format or certification. To use CommonPass, travelers would take a Covid-19 test at certified labs, upload their test results to their phone and complete the health screening questionnaires required by their destination country.

In October, The Commons Project successfully trialed the digital passport with Cathay Pacific and United Airlines for flights between Hong Kong, Singapore, London, and New York, with multiple government authorities observing. The rollout is expanding to additional airlines and routes in quick succession. In December, JetBlue, Lufthansa, Swiss International Airlines, United Airlines, and Virgin Atlantic will roll out CommonPass on select flights, according to The Commons Project.

A broader deployment is planned for 2021 and is designed to incorporate a traveler's vaccine status for Covid-19 and other diseases.

—Dawit Habtemariam



Cross-Border Consolidator

MANAGING DIRECTOR, CTM

JAMIE PHEROUS

Corporate Travel Management's \$200 million acquisition of Travel and Transport was a major deal in its own right, but the purchase could serve as a harbinger of the next wave of industry consolidation, as travel management companies continue dealing with the financial fallout from the Covid-19-induced freeze on corporate travel activity.

For Australia's CTM and its managing director, Jamie Pherous, the acquisition was the culmination of several years of courting Omaha-based T&T, which operates the 100-plus agency-strong Radius global travel management network. T&T acknowledged that the decision to sell was driven primarily by the economic pressures from the Covid-19 pandemic, which has choked off revenue streams for TMCs.

With little clear indication of when corporate travel might return to anything approaching normal levels, providers are scrambling to figure out how to stay afloat amid the unprecedented challenge. For the biggest and deepest-pocketed TMCs, a mix of belt-tightening and re-evaluating pricing models might be sufficient to stay afloat for the time being.

But among midsize and small TMCs, it's a safe bet that potential sales have been at least imagined during the past several months. For such sellers, prominent on the list of potential suitors are TMCs whose business remains relatively healthy, such as CTM, whose recovery was touted by Pherous as early as mid-August.

Pherous attributed the company's comparative health to its significant presence in New Zealand, one of the first countries in the world to begin easing lockdown measures, as well as its high percentage of corporate clients working in sectors deemed essential and its emphasis on domestic travel, which accounted for 60 percent of its pre-Covid revenue.

Given his company's relatively strong position, Pherous made no secret of CTM's plans to leverage that advantage to acquire competitors, calling the current moment "a unique generational opportunity for consolidation."

As other players in the TMC space continue facing existential threats to their business and many begin seeking an escape hatch, CTM's planned shopping spree likely will take place in a buyers' market.

—Adam Perrotta

Omnichannel Assembler

PRESIDENT AND CEO, ARC

MIKE PREMIO

Air booking transaction settlement provider Airlines Reporting Corp. made a splash early in 2020, acquiring a majority stake in booking app developer NuTravel, which operates a direct air booking platform. Following ARC's 2019 investments in off-channel data capture specialist Traxo and blockchain-based booking and transaction management supplier BlockSkye, the NuTravel deal was the next major step in ARC's push to play a greater role in corporate travel transactions booked outside of traditional agency channels.

For ARC president and CEO Mike Premio, the trio of complementary deals were designed to address what he described as a blurred line between direct and indirect booking in the eyes of business travelers, which increasingly were being pulled to airlines' websites for booking.

"It's becoming clear that the gravity pulling particularly business travelers to airline websites is creating challenges for the TMC ecosystem as well as corporate travel managers," Premio said at the time of the investment. "This seemed like a fairly interesting space for ARC to do something that aligns with that high-level mission and see if we couldn't find some ways to take some of the friction out of this."

NuTravel's Universal Connect integrates within airlines' direct booking sites and mobile apps, overlaying corporate travel policy, rates and payment methods, while enabling travel managers to track and manage those direct bookings.

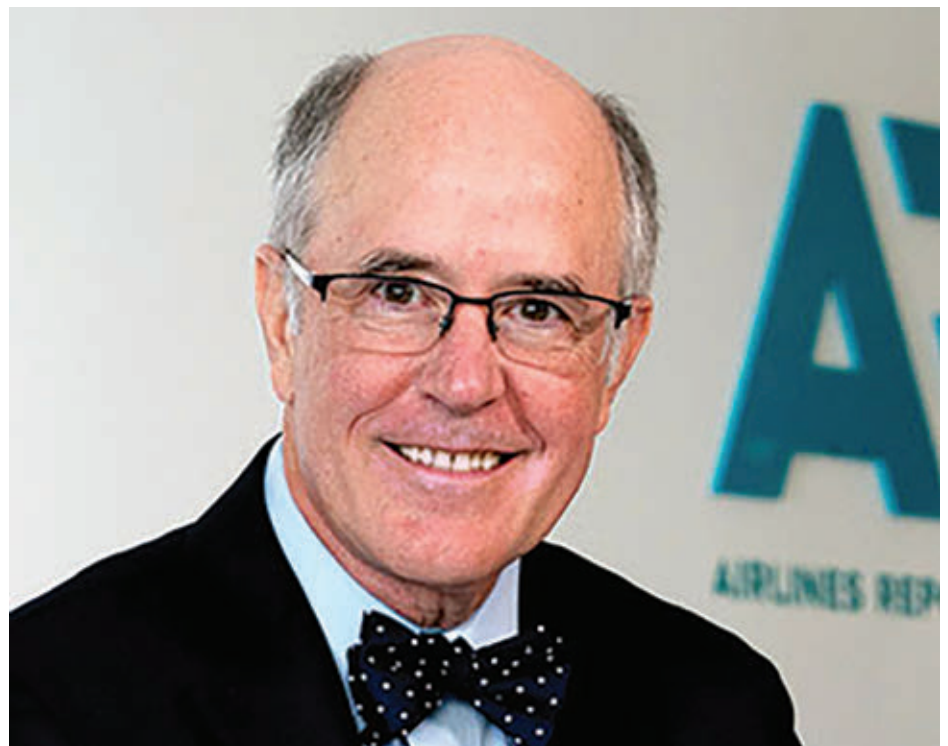
But ARC's omnichannel vision maintains a central role for TMCs, in the form of servicing direct bookings and providing other support and advisory services—and that role has taken on even greater importance since the onset of Covid-19, Premio noted.

"We believe that ... the crisis will only accelerate the trends that existed beforehand," Premio said. "Suppliers, TMCs and corporations all need better tools to manage business travelers' access to the comprehensive content that the airline direct channel provides, and at the same time, provide the attentive service and vital duty of care that TMCs provide and corporate travel managers demand."

Premio said the upped onus on duty of care among travel managers will lead many to find greater value in working with TMCs to track travel restrictions, quarantine measures and health considerations. He predicted TMCs that can combine those support and intelligence services with flexible booking capabilities—including the direct channel—will be "critical for a complex post-pandemic environment."

Premio joined ARC in 2006 as its vice president of business development and was named president and CEO in June 2011. Under his leadership, company revenues grew 44 percent. He will retire at the end of this year. Current ARC EVP and COO Lauri Reishus has been named as his successor.

—Adam Perrotta



Airlines' Best Friend

ATPCO PRESIDENT AND CEO

ROLF PURZER

This is Rolf Purzer's second appearance on BTN's Most Influential list, the first being in 2018. It's also likely his last, as Purzer, who has been with ATPCO since 1996 and took over as president and CEO in 2017, is retiring at year-end. He'll finish his term with a bang, as 2020 was a year far different than any other, even for someone with nearly 40 years of industry experience.

ATPCO has focused on providing carriers with the technology needed to weather the pandemic and operate in the years ahead in a rough market. "The industry will have to live within tighter guardrails, within tighter budgets, with less people and that is a productivity challenge, among other things," Purzer said. "We pivoted our resources to this type of solution to help the industry to be more productive and do more with less."

When Western governments took action against the Covid-19 virus in February and March, travelers stampeded airlines and their distribution channels with demands to change or cancel their tickets. The airline industry, often with manual processes for changing tickets, was overwhelmed. At the same time, airlines canceled flights en masse, leaving corporates and their travelers with unused tickets. For this unprecedented situation, corporates were unsure of the ticket-change rules, and airlines needed flexibility.

Within 10 weeks, ATPCO in collaboration with more than 60 airlines and global distribution systems, brought to market the Emergency Flexibility Tool, which allows airlines to automate changes to their rules around ticket changes, allowing tickets purchased before the Covid-19 crisis to be updated.

Meanwhile, ATPCO's crisis team in April added to booking content displays its Reassurance Universal Attribute, a metric that provides information on health-related procedures and protocols that airlines are taking, such as cabin cleaning and food service hygiene, along with booking flexibility.

In October, to help travelers compare airlines' pandemic-related protocols when flight shopping, ATPCO introduced a new standard data format for Universal Product Attributes called "Structured UPAs." The new format builds off RUA and lists the data along five categories: cleaning procedures, including products used and frequency; facial covering requirements; pre-flight temperature checks; seat-blocking policies, such as keeping middle seats vacant; and capacity limits. As of November, 313 airlines, representing 95 percent of all commercial flights, have adopted Structured UPAs. ATPCO intends to expand the format to include topics outside of pandemic policies and procedures.

In November, ATPCO introduced Architect, a platform that enables airlines to simplify and consolidate their fare filing processes. With the platform, airlines will have the flexibility to adapt their fares to network changes, which may be caused by the pandemic.

Even though his tenure ends at a sad time, Purzer said, "I'm proud over the last four years to have helped ATPCO evolve into an organization that is very much inclined to always bring value to the industry," he said.

—Dawit Habtemariam



Bridge Builder

CHIEF REVENUE OFFICER, AMERICAN AIRLINES

VASU RAJA

Like all major airlines, American Airlines will have a significantly reduced network in 2021, but the carrier also will benefit from several new partnerships—including some previously frosty relationships that it now has thawed.

Led by then-SVP of network strategy Vasu Raja, who in June was promoted to the newly created position of chief revenue officer, American in February announced it would partner with Alaska Airlines to form a "West Coast International Alliance." The partnership—which includes codesharing, reciprocal loyalty program and American's entry into the Oneworld alliance next year—connects Alaska domestic West Coast network with American's international network in Los Angeles and Seattle, where American is adding service to London and Bangalore next year.

American took a similar approach with a new partnership with JetBlue, which the carriers announced in July. American plans to connect its international network out of New York's John F. Kennedy International Airport with JetBlue's expansive domestic network. JetBlue does not plan to join the Oneworld alliance, however.

American also restarted codesharing with Qatar Airways this year. Though both Oneworld partners, American had ended its codeshare relationship with Qatar in 2017 amid the long-running dispute between U.S. carriers and Gulf carriers over allegations of Open Skies violations. American now sees working with Qatar as part of its plan to build its network to the Middle East, India and Africa.

American is relying on those relationships, along with long-established relationships with British Airways parent company International Airlines Group, as it refocuses its hub strategy and plans for smaller international operations in a post-Covid world, with Dallas-Fort Worth as its major transpacific hub, Miami its key hub for Latin America and the Caribbean and Philadelphia a major transpacific hub.

"In a world where there is less demand than there is supply, it makes what we do across these different partnerships so critical," Raja said. "What hasn't changed is having a large and expansive network is very valuable, and we do that both by flying to places ourselves and by having partnerships that enable connectivity, and by using these partnerships to grow our own organic network."

—Michael B. Baker



Cleanliness Uniter

PRESIDENT AND CEO, AMERICAN HOTEL & LODGING ASSOCIATION

CHIP ROGERS

Right after Covid-19 was named a pandemic in mid-March, it became clear to Chip Rogers, president and CEO of the American Hotel & Lodging Association, that the most important issue AHLA could work on was hotel safety and cleanliness.

In May, AHLA introduced its Safe Stay guidelines, which have been adopted by every major U.S. hotel company and thousands of individual hotels, Rogers told BTN. "Given what consumers are concerned with ... I think it was very beneficial from an early stage to have the industry unite behind a single message," he said.

"That is where we knew the skill set of AHLA would come in handy in bringing the industry together," Rogers said. "But getting the traveling public to know about it is the most important thing, and I think we've done well there."

AHLA has updated the guidelines as the pandemic has evolved and will continue to do so based on the recommendations of public health authorities and to remain in compliance with any federal, state and local laws. The association also introduced a Safe Stay training course for hotels in early July, and by mid-July added a checklist for hotel guests.

Heading into 2021, AHLA aims to make sure Safe Stay is the adopted standard for local and state governments that are looking to regulate private industry. "The worst thing we can have happen is a local government come up with their own standards not adopted by the industry, not been approved by the proper medical experts," Rogers added.

And he will continue to lobby for more aid for the industry, which at press time was trying to attach additional Paycheck Protection Program funding to the legislation for a continuing federal budget resolution.

"If they pass a continuing resolution without PPP on it, then I think you are looking for another major package not happening until February," Rogers said. "Between now and then, you could have hundreds if not thousands of hotels close their doors for good. And that is just devastating."

—Donna M. Airoidi



Data Privacy Champion

HONORARY CHAIRMAN, NONE OF YOUR BUSINESS

MAX SCHREMS

Max Schrems took on big business and governments over their privacy violations and won—twice. His legal campaigns have had profound consequences for the many companies in corporate travel that transfer data about European citizens to the United States.

Following Schrems' most recent victory, a European Court of Justice ruling in July, German travel managers' association VDR warned members to pause permission for exporting data to the U.S. unless they could ensure its safe treatment—which, as the judgment established, is virtually impossible.

Schrems, an Austrian, only turned 33 in October but is already a data-privacy veteran. In 2011, while still a law student, he submitted a request to Facebook to provide all the data it held on him. He was shocked to receive a file running to 1,200 pages.

Following the revelations of U.S. intelligence whistleblower Edward Snowden, Schrems took Facebook and then Ireland's data protection commissioner—Facebook's European headquarters is in Dublin—to court, arguing no data could be transferred safely to the U.S. because of its mass surveillance programs. The ECJ agreed and accordingly invalidated Safe Harbor, the mechanism by which U.S. companies self-policed their ability to import data in compliance with the more stringent standards of the EU.

The EU and U.S. replaced Safe Harbor with the more robust-sounding Privacy Shield, which offered more protections and oversight. Schrems again challenged, and this summer, the ECJ once again threw it out for essentially the same reason. "The Court clarified for a second time that there is a clash between EU privacy law and U.S. surveillance law," said Schrems.

Many travel companies had switched to Privacy Shield as their legal framework for data transfers to the United States. Still more use standard clauses inserted into contracts to provide legal guarantees of privacy compliance by the supplier or service provider. The ruling did not invalidate those clauses but effectively cast doubt on whether they are reliable in practice.

U.S.-bound data transfers have remained in legal limbo ever since. Perhaps the EU can find a way through with the incoming Biden administration after no progress with its predecessor. Schrems himself holds little doubt as to the solution. "The only way to overcome this clash is for the U.S. to introduce solid privacy rights for all people—including foreigners."

—Amon Cohen



The Repudiator

CEO, WEX

MELISSA SMITH

In a vivid illustration of just how atypical this year has been for business travel, one of 2020's most influential deals was one that fell apart. In May, virtual card giant Wex said it was pulling out of a planned \$1.7 billion acquisition of travel payments specialists eNett and Optal, which the parties had definitively agreed upon in January.

In announcing her company was putting the brakes on the deal, Wex CEO Melissa Smith cited the devastating effects Covid-19 had wrought on the corporate travel industry in the months after the pact was signed. Wex invoked the fallout as a "material adverse effect" on the business of eNett and Optal, thereby giving Wex the right to negate the sale agreement under terms of the contract.

Wex's counterparties in the transaction—including eNett majority owner Travelport—filed a lawsuit in a U.K. court seeking to compel the completion of the sale on the grounds that the Covid-19 outbreak was widely known at the time of the sale and that pandemics had been carved out from the definition of material adverse effects as set forth in the contract.

In October, the court sided with Wex on a key preliminary issue in the case, ruling that eNett and Optal should be defined as operating under the broader business-to-business payments industry instead of the narrower travel payments vertical, which has suffered a more widespread overall downturn than B2B payments at large amid Covid.

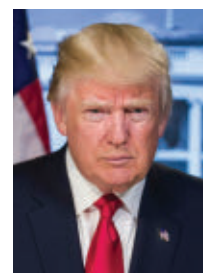
The ultimate decision in the case will have a major effect on the bottom lines of the parties involved, all of which continue to face revenue headwinds as business travel remains drastically reduced. And should Wex be allowed to walk away, it could open the door for parties to other Covid-era agreements to seek reversals of their own deals as well.

—Adam Perrotta

The Skeptic

PRESIDENT OF THE UNITED STATES

DONALD J. TRUMP



Assessing counterfactuals in which President Donald Trump handled the Covid-19 outbreak in the United States in a different fashion will be the job of historians in the decades hence. We'll never know if a different response from Trump and his administration

could have mitigated the devastating, continuing effects of the coronavirus on the business travel industry.

Defenders of the president would note that he did take action to stem the spread while boosting the industry. It was Trump who controversially first banned foreign nationals from entering the United States from China at the end of January. It was Trump who signed the Coronavirus Aid, Relief, and Economic Security Act, boosting industry suppliers, and it was he who discouraged full state and municipal lockdowns. He also advocated for direct aid to the U.S. airline industry and signed off on the Operation Warp Speed vaccine-development effort.

And, as he often noted, it was the Chinese government that failed to keep the coronavirus within its borders or address the outbreak forthrightly, and the World Health Organization which initially determined Covid-19 wasn't spread person to person.

But it was also Trump who repeatedly downplayed the virus, especially in its early days, declined to support edicts to wear masks and failed to ramp up testing capacity in the early days of the pandemic. His clumsy March 11 Oval Office address, in which he suspended entry of foreign nationals who were from or had visited the European Union's Schengen Area, confused many travelers who crowded airports to return home as soon as possible.

Whatever the historical view of Trump's coronavirus legacy, the fact remains that the United States has more positive cases and deaths from Covid-19 than any other country in the world, and its business travel industry, unlike that of some other countries—particularly in the Asia-Pacific region including, ironically, China—remains severely curtailed. U.S. business travelers for the most part can't visit the United Kingdom without quarantining for several days, generally can't enter the European Union under most circumstances, and in nearly all circumstances aren't even allowed to enter Canada.

And while the president may yet wield some further industry influence in the form of a fresh round of financial relief in the waning weeks of his term, a new administration will oversee the country's and industry's recovery, with Trump's tenure arguably undone by his response.

—Chris Davis

The Voice of Reform

LETTER AUTHOR, GLOBAL BUSINESS TRAVEL ASSOCIATION

ANONYMOUS WHISTLEBLOWER

The anonymous letter to the Global Business Travel Association board of directors was dated June 8. The contents—allegations against GBTA's then-CEO Scott Solombrino and to a lesser extent the board of directors of cronyism, financial mismanagement and staff intimidation and discrimination—moved the board to put one of GBTA's longest-serving volunteers and recently appointed senior executive on administrative leave starting June 19, after the allegations went public. An investigation headed by N.Y.-based law firm Polsinelli concluded in late July that “no misconduct or legal wrongdoing by Mr. Solombrino was found,” according to a GBTA press release. Nevertheless, the GBTA board of directors and Solombrino mutually agreed that was time for Solombrino to seek other opportunities. Several industry insiders claim Solombrino received a payout on his departure, but BTN could not confirm.

During the course of the investigation, supplier organizations and volunteers began distancing themselves from the organization, citing the surfaced allegations and the slow pace of the inquiry. Travel technology giant Concur was the first to go public with their decision, but they were followed by mega travel management company CWT. Other major companies told BTN in confidence that they had pulled their support. In addition, the organization's Risk Committee collectively threatened resignation and the Accommodations Committee withheld deliverables, pending a satisfactory outcome of the investigation.

In the wake of the allegations—which suppliers like American Airlines called “courageous”—the investigation and Solombrino's voluntary departure, the GBTA board hired industry veteran Dave Hilfman as interim executive director and hired association consultancy MCI USA to conduct an organizational assessment. As a result of that assessment, GBTA has enlarged and increased diversity among the board of directors and redoubled its efforts to engage with voting members and to encourage new candidates to throw their hats into the ring for volunteer board seats. Hilfman's interim tenure comes due at the end of the year and he is leading, with the assistance of MCI, a hiring committee to recommend a permanent replacement that will ultimately be appointed by the board of directors. A source speaking on condition of anonymity said the position has received hundreds of applicants but has been narrowed to 12 as of press time.

—Elizabeth West

The Advocate

CHIEF EXECUTIVE, THE BUSINESS TRAVEL ASSOCIATION

CLIVE WRATTEN

One of corporate travel's strongest voices on either side of the Atlantic during the coronavirus crisis has been Clive Wratten. The chief executive of the Business Travel Association, representing travel management companies in the U.K., became a regular interviewee on news channels to argue for financial support and assistance in getting businesses flying again through effective testing, consistent quarantine policy and creation of air corridors.

The visible profile helped a struggling sector draw hope that at least someone was battling on its behalf. But, said Wratten, more important was BTA activity “below the surface” through engagement with the U.K. government. Activities included representation on a global travel task force created by the Department for Transport, which also commissioned the BTA to conduct a survey of business travelers that was delivered to Prime Minister Boris Johnson.

However, if Wratten succeeded in gaining the ear of government, it must at times have felt like a tin ear, as the travel industry was ill-served by a series of seemingly incoherent and knee-jerk decisions, especially around quarantining. “What I've learned is that everything is a step along a journey,” said Wratten. There have been more successful steps in recent weeks, including an extension of financial assistance for furloughed employees and a relaxation of quarantine restrictions on certain categories of business travel.

Under Wratten, BTA also was swift to support the many corporate travel personnel who lost jobs in 2020. It launched BTA Cares, a mentoring program that advises on preparing CVs, interview presentation and transferring skills to other sectors.

Wratten, a former TMC and airline executive, showed great empathy and humility in a series of social media posts where he was frank about the mental toll he has paid for fighting to save his sector. “I have had some major highs and lows, and I have found it depressing at times. I wanted to share that with people,” he said. Wratten has seen many industry friends, including both partners in married couples, lose their jobs. “It can't help but affect you when you hear about it every day,” he says.

Refreshing candor was also evident in a much-discussed white paper published jointly by BTA calling for reform of fee structures for TMCs but also greater transparency from TMCs over the two-thirds of their income earned from suppliers.

—Amon Cohen

The Virtual Connector

CEO AND FOUNDER, ZOOM

ERIC YUAN

In lieu of the meetings and conferences canceled due to Covid-19, businesses the world over have turned to virtual meetings and videoconferences, leaning on Google Hangouts, Webex and GoTo-Meeting, among many others. The situation also has spurred meeting technology providers, such as Cvent and Aventri, to introduce their own virtual meeting solutions, and Intrado and other videoconference providers to upgrade their technologies.

Zoom's rise symbolizes the evolution of virtual communication in business travel. The virtual meetings tool historically has been perceived as an upgraded phone call. Now, the tool has become so popular that it doubles as a verb for connecting with someone virtually. Total daily meeting participants on the platform's paid and free services jumped from nearly 10 million last year to over 200 million today, according to the Wall Street Journal.

With explosive growth, however, came privacy and cybersecurity concerns, long overlooked. “Zoombombing,” in which people with unauthorized access disrupt a meeting with inappropriate behavior, became a common term. The company has promised to address these gaps with recent upgrades and improvements. “I really messed up as CEO, and we need to win their trust back. This kind of thing shouldn't have happened,” Zoom CEO Eric Yuan told the Wall Street Journal.

At least five months in since the pandemic started, the industry still is adapting to Zoom and other virtual meeting platforms. According to American Express Meetings & Events' 2021 Global Meetings and Events Forecast, which is based on an August and September survey of more than 560 meeting and event professionals, 40 percent said a lack of knowledge or experience in using virtual meetings platforms was one of their top challenges in using the technology, while 32 percent noted technical issues and 18 percent cited lack of engagement.

One thing is for sure: Companies will use virtual communication as a substitute for business travel more than they did before the pandemic. About 56 percent of travel managers expect more than one-quarter of their travel volume to be diverted to videoconferences in 2021, according to BTN's 2020 State of the Industry survey.

—Dawit Habtemariam





CONTINUED FROM FRONT PAGE

Vaccine News: Fingers Crossed

reviewed ... to see if its real and valid and reproduceable. It goes into biostatistics: What was the patient population, and what was the exclusion, and how can we take the data and extrapolate to the community at large? They didn't disclose that in the media release.

Healix International chief medical officer Dr. Adrian Hyzler: I do feel we've been given a snippet of news that is remarkable, and we've heard the [Pfizer] CEO talk with amazing jubilation. Whatever anyone says, the company that got there first will have that badge and will always have that badge. I think that is one of the reasons why this has its limitations: It has to be stored at a temperature colder than the North Pole, and the vials contain just under 1,000 doses in a bottle. Anywhere that is going to distribute this vaccine [will] have to be prepared to give that out. Once you take it out of the ultra-cold storage, [there's] five days to distribute the thousand doses. They've forgotten about the individual little vials that would slow down production enormously [and took a pass on] getting a more stable lipid around the mRNA that would make it more transportable. They've just gone, 'Listen, let's just get this out.' I believe the Moderna vaccine can be stored at warmer, more accessible temperatures. *[Editor's note: Pfizer's must be stored at -94 degrees Fahrenheit. Moderna's, now announced, must be stored at -4 degrees Fahrenheit].* It's the same kind of vaccine. Great that Pfizer got it out there; literally, amazing results. But there are still things to think about.

International SOS SVP and global medical director Dr. Robert L. Quigley: I was thrilled. Like everyone else, I can see pandemic fatigue in my own life. We need a catalyst to get us back to normal commerce and normal life. I was a little surprised; I'm a doctor of immunology. I was surprised to see efficacy up in the 90 percent range. I'm not alone in that. Other colleagues have the same reaction. Almost unprecedented that it's that high. But I'll take it. If the trial at Phase 3 that's coming to completion [in several weeks] continues to indicate that efficacy, I'll take it. It will boost confidence of those who want to travel but also get us to herd immunity. I'm very optimistic about that, but also realistic about the next steps.

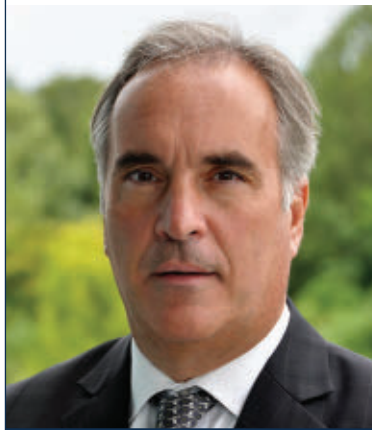
EVERYONE'S EXCITED ABOUT THIS PARTICULAR VACCINE, BUT OTHERS ARE COMING UP. WHAT ARE YOUR EXPECTATIONS?

Weisenfeld: To a certain degree [the Pfizer vaccine] may be dead in the water: First, it's two doses. One-third of the population wouldn't even get the first vaccine for a variety of reasons, much less capturing a population to take the second one. Second, the bigger logistical barrier is the temperature thing. It's paramount because we cannot safely transport that vaccine under its own quality maneuvers. The refrigerator to take it down to that degree—not even all academic facilities would have that refrigeration. Certainly, community-based facilities [wouldn't have that]. This is an RNA vaccine, which means it's easy to produce, and it hit that Phase 2 and 3 clinicals quicker than some of the others. I think the other vaccines will catch up. From the pragmatic standpoint, I believe we are going to look at a traditional vaccine like we had with H1N1 [as opposed to an RNA-type vaccine].

Hyzler: The fact that it's an mRNA vaccine is hugely significant. *[Editor's note: The Moderna version also is an mRNA-type vaccine. No mRNA-type vaccines ever had won approval for use by a federal administration, until the U.K.'s Dec. 3 Pfizer approval.]* We have a snippet of genetic material that tells the muscle cells in the body to make the [Covid-19] spike protein. You are not putting the live virus in the body. Some



Global Guardian medical director Dr. Shelly Weisenfeld



International SOS SVP and global medical director Dr. Robert L. Quigley

"We'll see airlines or destinations require certain documentation before you get there. A demonstration of vaccination might be your passport to enter."

—INTERNATIONAL SOS' DR. ROBERT QUIGLEY

vaccines are attenuated live viruses. Some are bits of dead virus. This is not. The real amazing thing about this is that it can be made quickly and in huge amounts, and we don't know of any safety issues yet. Also, if you get a mutation, it's easy to tweak the RNA to incorporate that mutation and you won't need to go through the clinical trials again. This is a proof of concept. Assuming it all goes through, it will be amazing for other diseases too.

Quigley: Operation Warp Speed [in the United States] and Covax, a global initiative, are working in parallel. We have a lot of European and American pharmaceutical companies pushing to get their products out. Pfizer's announcement was well-received and may encourage other competitors to come forward. Warp Speed and Covax have to decide which vaccines to use and how to make that decision. The more efficacious the vaccine, the more we will want to invest in that, but are these companies capable of producing the quantities required? I'm going to speculate that other vaccines will be utilized. Because I don't think the capabilities of production [of the Pfizer vaccine] are such that we could get the hundreds of millions of vials in the timeframe that we like. So there will have to be other types of vaccines that are prepared differently. Of course, we are hoping the efficacy will be competitive with Pfizer.

TO STOP A PANDEMIC, EVERYONE NEEDS ACCESS, NOT JUST WEALTHY COUNTRIES. HOW DOES THIS WORK?

Weisenfeld: In the geopolitical context, [we have to ask] how we can provide this ethically. How can we allow [access for] other countries that may not have the economic resources to buy and distribute the vaccine when they are more limited in their infrastructure? The whole equality thing is emerging in this wake—and this is great. It needs to be addressed. That will require more cooperation and an aerial view of health, global policy and public health. Operation Warp Speed, at least domestically, had some foresight. Companies are spinning up manufacturing just waiting for the switch to be flipped. But then you have to decide who gets the vaccination first. There are a few models out there. Whether it's tiered or phasing, the front lines will get the vaccine first. I think most people would understand this is reasonable. Then they'll tier out to the most vul-

U.K. Allows Quarantine Exemption for Some Travel; Delta Plans 'Tested' U.S.-Europe Service

BY MARK FRARY & MICHAEL B. BAKER

The U.K. government this month began allowing an exemption from quarantine for business travelers arriving in England who “deliver significant benefit” to the U.K. economy.

It said that individuals “undertaking specific business activity which would deliver a significant benefit to the U.K. economy—including activity that creates or preserves 50-plus U.K. jobs – will no longer need to self-isolate when traveling or returning from non-exempt countries.”

The government added that individuals only would be exempt when undertaking the specific business activity and only would be able to meet with others as required by that specific activity.

It added that domestic and international performing arts professionals, TV production staff, journalists, and recently signed elite sportspersons, also would be exempt “ensuring that industries which require specific, high talent individuals who rely on international connections can continue to complete their work.”

Clive Wratten, CEO of the Business Travel Association,

said: “The announcement that government-selected categories of business travelers returning to the U.K. are exempt from quarantine is a step in the right direction. However, business travel takes many forms and all should be exempt.

“Engineers, humanitarian workers, retail buyers and many other professionals travelling for work are all crucial to the U.K. economy.”

Public Health England said it did not “anticipate these changes will raise the risk of domestic transmission, due to the protocols being put in place around these exemptions, however all exemptions will remain under review.”

DELTA TO ADD 'COVID-TESTED' FLIGHTS

Meanwhile, Delta Air Lines and Alitalia plan begin operating this month “Covid-tested” flights between Rome and the U.S. that allow select travelers to avoid quarantine requirements upon arrival in Italy. Delta and KLM announced similar plans for Atlanta-Amsterdam flights.

In the trial phase, approved by Italy’s Ministers of

Health, Transportation and Foreign Affairs, passengers arriving from New York’s John F. Kennedy International Airport, Newark and Atlanta will be tested for Covid-19 both prior to departure and upon arrival in Rome. Rome’s Fiumicino Airport already has had a rapid testing center available for several months. Passengers with negative results on both tests can skip the 14-day quarantine requirement in Italy.

Delta plans to relaunch service between Atlanta and Rome on Dec. 19, and its program will consist of four testing stages for passengers. They will require a Covid Polymerase Chain Reaction test taken up to 72 hours prior to departure, followed by rapid tests at the airport in Atlanta, upon arrival in Rome and again in Rome prior to departure to the United States.

Travelers beginning Dec. 15 can avoid the Netherlands’ 10-day quarantine by taking a PCR test five days before arrival in Amsterdam, isolating until departure, then taking a rapid test at Atlanta’s airport, and finally another PCR test upon arrival at Amsterdam Airport Schiphol. ■

nerable: institutions, nursing homes, prisons. They’ll immunize room to room in the hospital setting because those patients may be at risk.

IS THERE ANY CHANCE THAT A COMPANY WOULD BE ABLE TO GET IT FOR THEIR WORKERS? LIKE A FLU SHOT DAY AT THE OFFICE OR MANUFACTURING PLANT?

Hyzler: We’ve had a number of organizations contact us to say, ‘Hey, listen, can I get this vaccination for our company?’ It would be too sensitive if Pfizer were to give vaccines to some multinational corporation. I don’t think it’s possible in the early stages when everyone is keying up to give to vulnerable people and trying to save lives. Selling to companies to try and promote business—I don’t think there will be a private market auction at this stage. A number of organizations—Pfizer for sure—have said this is not for profit, just recouping their costs.

Quigley: I never cease to be amazed by the human species. But ISOS has always been very respectful of regulations, guidelines and mandates. The bottom line is that we cannot intervene or jeopardize whatever the government has in place.

Weisenfeld: I don’t see that happening. It will be several months after the vaccine is released and manufactured to scale before it would even become available to the business travel population at large. When you take that perspective, it’s a lot longer than current messaging would lead you to believe.

HOW WILL WE SEE VACCINATIONS IMPACT BUSINESS TRAVEL AND FREEDOM OF MOVEMENT ACROSS BORDERS?

Quigley: We’ll see an evolution of what we have already seen. We’ll see airlines or destinations require certain documentation before you get there. A demonstration of vaccination might be your passport to enter. I can see that happening in what I’ve seen countries trying to control. ... It will take some time to get to the point, but it might be your requirement to have this to cross borders. Domestically, I don’t know. It would behoove most people to get the documentation.

Weisenheld: Internationally, we will have something like a passport with



Healix International chief medical officer Dr. Adrian Hyzler

immunization—something to show that you’ve had the vaccine. I hope that we are all agreed on the same vaccine and efficacy so we can have the same language on it. I sense that will take a lot of time to work out. I think it will happen within two years.

Hyzler: It will be a while before the vaccine can feed through to reduce quarantine times. Some vaccines may not be accepted by certain governments [as effective enough]. We’ll have to see standards and agreements on those solutions as well. In terms of stimulating business, I could see vaccinations playing out at the country level—[for those] able to vaccinate en masse. Say a country like Finland, a real leading light in how they have handled the pandemic. They are in an incredibly good situation and keeping a lot of the country working. As a country of 5 million, could they get enough vaccinations to two-thirds of their people, which is what is needed, including vulnerable people? If so, they could then say, ‘We’re open. Come to Finland.’ From a country point of view, we get to see a difference. Rather than a large tranche of businesspeople saying, ‘Look at my app; I’m vaccinated.’ Some countries will be in a better position on this than others, and it could benefit them economically. ■



GBTA Completes Acquisition of ACTE Assets

Former ACTE board members Alison Taylor and Steve Sitto named to GBTA board

BY ELIZABETH WEST

The Global Business Travel Association last month completed its acquisition of certain assets of the former Association of Corporate Travel Executives, which shuttered in April as an early business travel industry casualty of the coronavirus pandemic.

According to late October court documents that detailed the liquidation of ACTE’s assets, GBTA agreed to purchase ACTE’s “copyrights, domain names, social media accounts, patents, trademarks, logos, designs, trade names, slogans, brand names, fictitious names, corporate names, or other indications of origin, trade secrets, know-how, software, together with any registrations therefor and all other goodwill associated therewith, and all other intellectual property and proprietary rights” in a \$35,000 transaction.

The purchased assets did not include customer lists or customer information, according to the documents.

GBTA’s ambitions to leverage the ACTE brand seem to go far beyond simple asset acquisition. In addition to assets, GBTA has reached into the volunteer pool of the former association, naming to its board of directors American Airlines chief experience officer Alison Taylor and Tesla senior manager global travel and events Steve Sitto. Both formerly served on the ACTE board of directors, while Taylor additionally served on GBTA’s WiniT (formerly, Women in Travel) strategic advisory board.

Taylor will serve the remainder of the vacant Allied Leadership Council vice presidency. Sitto will serve the remainder of the vacant Direct Member At-Large term. Both terms will be com-

GBTA has created a new committee to re-activate and integrate the ACTE brand within the larger scope of the organization.

pleted at the time of the GBTA Convention, slated for July 2021 in Orlando.

GBTA has also created a new committee to re-activate and integrate the ACTE brand within the larger scope of the organization. Former ACTE executive director and current Digitravel Consulting SVP Greeley Koch and current GBTA chairperson Christle Johnson will co-chair the committee, which will work with GBTA staff and volunteers to determine how an integrated organization can best serve members, according to the GBTA press release.

Current GBTA board president Bhart Sarin thanked Koch and GBTA interim executive director Dave Hilfman for realizing what he called a “long-time dream” of bringing the two organizations together.

ACTE and GBTA (then called the National Business Travel Association) flirted closely with a merger in 2009 in the wake of the 2008 economic crash, but it didn’t result in a match. It ended with the resignation of several ACTE board members and some soured relationships on both sides. Especially given the industry’s economic hardships at the time, suppliers seemed largely the supportive of the combination and urged the two organizations to reconsider. This time around, ACTE’s financial straits cleared the way. ■

Survey: Amid Vaccine Talk, Travelers Somewhat Ready to Go

BY DAWIT HABTEMARIAM



Half of travel buyers indicated their organizations’ employees now are very or somewhat willing to travel, according to a new Global Business Travel Association survey. The survey, conducted Nov. 9-16, coincides with news of the apparent efficacy of multiple potential Covid-19 vaccines.

GBTA surveyed 822 industry professionals, 40 percent of whom were travel managers or procurement professionals.

About 42 percent of non-European travel buyers surveyed indicated they expect their organizations within six months to reach half of its 2019 domestic business travel level, and another 39 percent expect to reach that level within a year. About 58 percent of European buyers expect to

reach that 50 percent threshold within six months, another 33 percent within a year, and 3 percent already have reached it.

GBTA did not detail the number of European and non-European buyers in its survey.

Meanwhile, about 59 percent of non-European buyer respondents said their organizations wouldn’t reach 50 percent of 2019 levels of international travel for at least another 10 months.

Buyers also were asked how willing their companies would be to encourage employees to download an app that would track and trace travelers to assist in contact-tracing efforts. About half said their companies would be very or somewhat willing to implement such a policy, with 15 percent unwilling, with the rest either unsure or “neither willing nor unwilling.” ■



Amex M&E Forecasts Lower 2021 Mtg. Budgets

The American Express Meetings & Events 2021 Global Meetings and Events Forecast, released last month, confirmed what many meeting planners and managers know: Hybrid meetings will be a path to in-person gatherings; small and local events will be more popular in 2021 than large meetings; and hygiene as well as safety and security assurances—not just stated protocols—are paramount for events to move forward.

The report is based on a survey of more than 560 meeting and event professionals who represent corporations, associations, buyers and suppliers from 37 countries, as well as interviews with 16 industry experts. The survey and interviews took place in August and September 2020.

New to the survey is the addition of small and simple meetings as its own category of meeting. Respondents said that small and simple meetings would be the most common type of meeting held in 2021 in all formats—in-person, hybrid and virtual—at 21 percent of all events, with internal meetings at 18 percent.

Respondents cited two main factors when considering whether to hold an in-person event: 68 percent cited confidence in attendee health and safety components, and 59 percent said flexible cancellation and attrition terms. The capacity to accommodate social distancing, noted by 77 percent of respondents, was the overwhelming factor in meeting location choice, followed by disinfection protocols at 52 percent.

Travel Vitals, a platform launched in July by American Express Global Business Travel, of which Amex M&E is a division, “is one way meeting professionals can get information about health and hygiene guidelines and government restrictions,” Amex M&E SVP and general manager Gerardo Tejado told BTN. “It is a combination of leveraging third-party sources for what is needed to make sure people feel comfortable.”

Virtual Challenges

Interviewees acknowledged that virtual meeting components likely are here to stay, not just because they have proven effective for certain types of meeting needs, but they also increased the number of potential audience members, allowing access for those unable to attend in-person events.

Respondents said the top challenges with virtual meetings, however, are a lack of knowledge or experience in using them (40 percent), technical issues (32 percent) and lack of engagement (18 percent). For North American respondents, the top responses were lack of knowledge or experience (36 percent), lack of engagement (34 percent), and limited budgets (21 percent). One way to help with engagement is to align virtual meetings to attendee personas, Tejado said, referencing Amex M&E’s identification of seven types of virtual attendees. “We identified who attends and how you need to understand who they are and what they are looking for to tailor content to them,” he added.

Further, professionals cited in the report cautioned that planning a virtual or hybrid event involved more

than setting up a conference call or live-streaming a meeting. For hybrid meetings in particular, it could be the “equivalent to the work of planning two separate meetings—one in-person and one virtual,” according to the report. Survey respondents said that 35 percent of virtual and hybrid events would require the services of a full-service agency. Additional costs could also include any pre-event needs, such as recording devices, or items for participatory events, like a wine tasting.

The findings show that “more is needed out of the meeting planner,” Tejado said, explaining that planners must focus on procurement, engagement and now even more on safety and security. “They need to make sure they have the right tools to give recommendations.”

Spend Trends

Average projected 2021 per-attendee per-day meeting spend varied based on the type of event, from a low of \$426 for small and simple meetings to a high of \$906 for incentives and special events. Overall, respondents estimated that 2021 meeting budgets would decrease year over year by 3.7 percent globally. By region, North American respondents expect those budgets to decrease 5.7 percent, Europe is expected to be down 8.1 percent, Central and South America down by just 0.6 percent, and Asia-Pacific lower by 1.3 percent.

The cost per attendee, excluding air, also is expected to fall for 2021, across all regions and all meeting type categories, with conferences and trade shows showing the steepest declines in North America (4.6 percent) and Europe (5.5 percent).

When asked which meeting aspect would be cut first with a budget decrease, 27 percent of respondents selected off-site optional activities, and 18 percent each first would reduce either the number of nights of the meeting or off-site evening events. Should budgets increase, 33 percent said they would use the extra funds to improve the on-site experience, and 31 percent said they would increase the use of technology.

Predicted average 2021 group rates for hotels varied by region. Globally, 42 percent of respondents expect to see rate declines. North American respondents predict a drop of 2.2 percent over 2020 rates, followed by Europe at a 2.1 percent decline.

Group air costs in 2021 were anybody’s guess: 32 percent predicted a year-over-year increase, 32 percent predicted a decrease, and 22 percent said they didn’t know what to expect. Crisis management and favorable cancellation policies polled higher than in previous years for the most valued attribute in a group air provider. Respondents also said that aircraft cleaning protocols and the ability to socially distance passengers were equally important factors.

Location and Space Concerns

Respondents said 36.9 percent of their 2021 events would take place in mid-tier properties, a drop from 45 percent in the last survey. Non-traditional facilities, however, fared well compared with last year, up to a projected 16 percent for 2021 events from 10 percent.

Part of the reason for the embrace of nontraditional sites could be the increase in small and simple meetings. “In some of these nontraditional venues,” Tejado said, “content has been more easily available on their platforms. What we are also seeing is, there was an uptick in use for them because they have more space for social distancing requirements.” ■

“In some of these nontraditional venues, content has been more easily available on their platforms. What we are also seeing is, there was an uptick in use for them because they have more space for social distancing requirements.”

—AMEX M&E’S
GERARDO TEJADO



Delta to Add Facial Recognition Checkpoints in Detroit



Delta Air Lines is building a “curb-to-gate” facial recognition program for domestic travelers at Detroit Metropolitan Wayne County Airport.

The first step was set to begin this month, when members of the U.S. Transportation Security Administration’s PreCheck program will be able to create a digital ID that combines their PreCheck Known Traveler Number and passport number in their SkyMiles profile in Delta’s app.

Upon check-in, travelers can opt in to the program to use that digital ID, verified by a camera using facial recognition technology, to go through the PreCheck security checkpoint at Detroit’s Edward H. McNamara Terminal.

The airport camera encrypts the image, removes biographic information and sends it to U.S. Customs and Border Protection’s matching service to verify the traveler’s identity, according to Delta.

Unlike other facial recognition programs, this one will not require travelers to show their identification at the checkpoint, a Delta spokesperson said.

Next year, Delta plans to expand the program to include bag drop and its boarding gates, enabling passengers to pass through all of those areas without a manual ID check. The carrier plans to replicate the experience at other airports.

“The Covid-19 pandemic has only deepened the importance of providing a touchless experience for our customers,” Delta chief customer experience officer Bill Lentsch said in a statement. “We plan to expand curb-to-gate facial recognition and digital ID beyond the Detroit test so that all of our customers can enjoy a seamless, touchless travel experience across our network.”

Participation is voluntary, and Delta will not store biometric data, according to the carrier. ■

Former IAG CEO Willie Walsh to Succeed de Juniac as IATA Head

Former International Airlines Group CEO Willie Walsh will succeed Alexandre de Juniac as director general and CEO of the International Air Transport Association next year, IATA announced.

IATA members ratified Walsh, who was a key figure in the creation of IAG and stepped down as its CEO earlier this year, as its new director general at their annual meeting last month.

De Juniac, who will step down from his position on March 31, indicated to IATA’s Board of Governors several months ago that he was ready to leave his role, according to IATA. He has led the organization since September 2016, following his departure as chairman and CEO of Air France-KLM.

“IATA has set the course to restore air

connectivity amid the pandemic with systematic pre-departure testing. We are well into preparations to fulfill critical vaccine distribution needs,” de Juniac said in a statement. “The building blocks for an industry recovery are in place, and now is the right time to hand over IATA’s leadership for the long process of recovery.”

Members at the annual meeting also named JetBlue CEO Robin Hayes and SAS Group CEO Rickard Gustafson as chairs of their Board of Governors. Hayes succeeds the current chair, Lufthansa CEO Carsten Spohr, and will serve through the association’s 2022 annual meeting, after which time Gustafson will take over as chair through the 2023 annual meeting.

IATA DEVELOPS CARBON OFFSET TRADING PLATFORM

Meanwhile, IATA has launched a trading platform for airlines and other companies in the aviation industry to buy carbon offsets.

The Aviation Carbon Exchange, developed with commodities trader Xpansiv CBL Holding, is a platform on which airlines, airports and airline manufacturers can buy credits for projects that reduce carbon emissions, including projects involving forestry, wind energy and ecosystem protection. The platform is integrated with IATA’s Clearing House to manage payment and delivery of carbon credits.

IATA designed the platform as a tool to help airlines meet the goals established by the United Nations’ International Civil Aviation Organization, which aims to cut by 2050 the aviation industry’s carbon emission levels to 50 percent of 2005 levels, according to IATA SVP for member and external relations Sebastian Mikosz. The platform “gives airlines access to top quality carbon offsetting schemes in real time with full transparency,” he said.

JetBlue last month made the first trade on the platform, buying credits toward the development of a wind farm in the Dominican Republic. ■



Covid Restriction Tracking Spurs Cottage Industry

BY JAY BOEHMER

The ever-changing patchwork of entry and quarantine requirements and in-destination restrictions related to Covid-19 has given rise to a cottage industry of specialists trying to keep pace with and extend up-to-date pandemic information to corporate travel players.

New tools and partnerships are coming fast. Last month, agency automation mainstay Cornerstone Information Systems and corporate travel startup Shep each announced a partnership with Sitata, one among a batch of firms monitoring Covid-era government restrictions and requirements. Sitata already had worked with Flight Centre Travel Group, Etihad Airways and Qatar Airways.

Another firm, Sherpa, also has made inroads with travel players.

Expedia-owned travel management company Egenzia confirmed Sherpa “as a source for Covid-19 related information” for last month’s launch of a tool that “provides on-demand access to alerts and advisories, such as changes to travel restrictions and self-quarantine policies” to clients. This information is “integrated directly into the travel booking process,” Egenzia announced.

Sherpa also is behind American Airlines’ searchable web tool, launched in September, that lets prospective travelers search destination-specific guidelines on visa requirements, personal protection mandates, quarantine measures and requisite health-related paperwork.

Yet another Covid-era tracker, Smartvel, has extended similar data to sites hosted by United Airlines and Delta Air Lines. The latter last month announced a searchable map-based tool on Covid-related travel requirements.

Covid-19 informational tools are not new. A wave of know-before-you-go TMC solutions, websites and portals washed over the market this summer.

There are other data sources and Covid-era aggregators, including duty-of-care and risk management players like Riskline and WorldAware, available to travel companies.

Yet another comes by way of a TMC that acquired a Covid-tracking startup and now markets its data feed to other travel companies. TravelPerk this summer bought a little firm called Albatross. After baking its data on restrictions and local requirements into TravelPerk’s own tools, including its online booking system, the Europe-based TMC with homegrown tech in October announced airlines, booking systems and online agencies now could tap its proprietary data feed via an API subscription.

Information Overload

“There’s a lot of information, and it’s fragmented,” Shep CEO Daniel Senyard said of the pandemic-related government restrictions that have given rise to content aggregators like Sitata.

“A lot of the work is on the employees to remember to go to all these external resources, websites and intranet sites,” said Senyard.

There’s also a burden on travel managers, he said, who find themselves regularly addressing one-off queries from travelers. That just “doesn’t scale,” he said. “As travel picks up, it’s going to get more and more dif-

“We detect these events, the filters work their magic, and anything we think is relevant gets passed to an analyst team for review and subsequent publishing.”

—SITATA’S ADAM ST. JOHN

ficult” to deliver the right information at the right time.

Shep operates a browser extension that lets corporate clients overlay customized messaging like policy reminders, pop-ups and notifications when employees interact with travel websites, including public sites like online travel agencies or airline-dot-coms and corporate booking sites like Concur Travel or Sabre GetThere.

Shep’s new API integration brings in Sitata-sourced data on health guidelines, entry restrictions and quarantine requirements to supplement other client messaging its browser plug-in already supports.

“We’re trying to display bite-size, hyper-relevant snippets at the time you need them,” Senyard told The Beat. “The uncertainty the traveler has and the additional work a travel manager has can be alleviated by popping this stuff up.”

Shep’s flagship corporate champion, Discovery Inc., has been working with Shep’s browser plug-in and testing the Sitata integration. Shep also could patch in feeds from a client’s chosen duty-of-care provider, such as WorldAware or International SOS, Senyard said.

Sitata has been around for several years, offering tech and services around travel disruption management, medical assistance and risk management for mostly non-business sectors before finding a Covid-era calling.

Sitata already had “the technology to track things as they changed,” like government restrictions, CEO Adam St. John said in an interview last month.

“We expanded the scope of our platform to start to detect announcements about travel restrictions and entry requirements. We built an API around it,” said St. John.

“It does use a bit of AI and machine learning that acts as a good filter on breaking news media, social, governmental announcements—basically anything we can get our hands on,” he said. “We detect these events, the filters work their magic, and anything we think is relevant gets passed to an analyst team for review and subsequent publishing.”

Cornerstone last month announced it is using Sitata APIs to extend content through a new “automated traveler communication platform that delivers personalized, destination-specific Covid information, designed to optimize travel agency workflow.”

“We started to look at: What do people need to know prior to travel, during travel and after travel?” Cornerstone CEO Mat Orrego said in an interview. “We started designing these templates and vetting it out with some travel managers and some of our customers. The response back was that it would be cool, but we needed an authority to say: ‘This is what’s going on at the airport before you check-in, this is what’s going in New York City before you get there, this is what’s going on after you get home—you’ve got to quarantine.’”

Given the variety of data sources, Cornerstone had options. “We looked at all of them,” he said of sources of Covid-relevant info, including traditionally corporate-focused risk management data providers. “They all have the potential to provide the same kind of information. Between the quality of the data, the ability to access and work through their API as well as the price point, all three came together with Sitata.”

Cornerstone has hundreds of corporate clients and travel agencies that use its Policy Compliance Manager engine that scans reservations data, applies policy or authorization rules and triggers automated messaging or actions. The new Cornerstone Risk Messenger capability, backed by the Sitata feed, is an extension of this system and now an option for Cornerstone’s base of corporate and TMC users. ■

The Beat



BA, Reed & Mackay Complete Direct Connect

Travel management company Reed & Mackay has built a direct connection to British Airways' New Distribution Capability-based application programming interface, the carrier announced last month. The connection gives the TMC's clients access to BA's NDC-piped content, which includes additional price points.

British Airways head of distribution Rogier van Enk in an interview said the Reed & Mackay integration took "just a few months from start to finish." BA noted that the NDC API gives the TMC access to "all of British Airways' content" through the agency's online, mobile and offline channels.

For years, Reed & Mackay has operated proprietary technology in the areas of online booking and mobile, and has developed some desktop technology for in-house agents.

Reed & Mackay joins other agencies that have built to BA's direct connect, including another U.K.-based TMC, Click Travel.

"More than 60 percent of our NDC bookings come through a direct connect," said van Enk. Much of the remainder is piped to agencies via aggregators, such as Travelfusion.

"The biggest question we had back in March when we started realizing how big the Covid pandemic would be was what the engagement of travel agencies would be with NDC," he said. "What we found, surprisingly, was that engagement increased. We saw more agents engaging and wanting to implement."

He added: "Agents were looking forward to the recovery, and they were looking at ways to improve or to build competitive advantage. Rich content like additional price points will be a very strong competitive advantage."

Van Enk said that "still a lot of our sales are going through" traditional global distribution systems and use legacy EDIFACT connections. He described these modes of connectivity as less flexible when selling ancillaries or accessing additional price points.

"We are discussing actively with all the GDSs about connecting their solutions to our NDC API," said van Enk. "Unfortunately, it hasn't resulted in a breakthrough. So our focus is really continuing on di-

"We are discussing actively with all the GDSs about connecting their solutions to our NDC API. Unfortunately, it hasn't resulted in a breakthrough. So our focus is really continuing on direct connect and other alternative NDC aggregators."

— BRITISH AIRWAYS'
ROGIER VAN ENK

The Beat

rect connect and other alternative NDC aggregators."

BA continues to levy a GDS booking surcharge on traditional channels, which has been adjusted upward over time.

Several years ago, BA pioneered the "private channel" model, through which select agencies could continue booking without incurring its surcharge via traditional GDS connections, with a migration plan toward NDC. Those deals already have wound down for some agencies.

"Private channels were always seen as a transition mechanism for agents to develop NDC solutions," van Enk said. "With agencies heavily impacted by Covid, we decided that in some cases we would maintain some of the private channel mechanisms and transition agreements and keep them in place for an amount of time to give agencies a bit more time still to transition to an NDC world. We're trying to be pragmatic and agent-friendly. I do have to stress that we want the agency community to keep moving, and we have to keep moving to that end goal: 100 percent NDC."

BA this year has continued to expand additional price points, sold exclusively through direct channels and NDC-based connections.

At this year's Business Travel Show in London in February, van Enk likened additional price points to "discounts" for agency adopters. Additional price points smooth out a staircase of fare pricing into a gradual slope. For example, if a traditionally sold fare class had a £50 price with the next fare class up priced at £75, only through NDC or direct channels would BA sell price points in between.

In conjunction with their NDC strategies, Lufthansa Group and Air France-KLM similarly have embraced additional price-point structures, also referred to as "continuous pricing."

Meanwhile, van Enk said BA has refined NDC-based capabilities this year, including introducing richer disruption management for agencies to handle flight cancellations, disruptions and changes via its API. Such enhancements have been underway for more than a year.

"The main requests we got from the agency community, particularly the TMCs, was how we handle bookings and servicing when disruptions happen, but also servicing in general," said van Enk. "That was a key priority for us in Q1, and that has proven to be extremely beneficial in the Covid world where we've seen mass flight cancellations, massive changes, etc." In subsequent quarters this year, BA has worked to close further servicing gaps, van Enk said. ■

AmTrav to Adopt Journera Travel Data Sharing Platform

BY ADAM PERROTTA

Travel data sharing specialist Journera has signed AmTrav at its first corporate travel management company user, the company announced last month. The agreement will enable AmTrav's corporate clients to leverage

Journera's services, which are designed to improve the overall trip experience by sharing disparate trip information, such as flight and hotel bookings, in one central channel. Advantages of that approach include in-

creased visibility into itinerary changes and cancellations, insight into trips booked via out-of-policy channels and more comprehensive duty-of-care capabilities, according to Journera.

Launched in 2015 with a focus on the leisure segment, Journera during the past year has been building out its platform to serve the corporate side and plans to add additional corporate TMCs to its existing base of airline and hotel partners, which include Hilton, InterContinental Hotels Group, Marriott, Hyatt, United Airlines and American Airlines. Journera was founded and is helmed by CEO Jeff Katz, who formerly served as the founding CEO of Orbitz and CEO of Swissair. ■

Assessing the Near-Term Future of Airline Booking

BY MICHAEL WU

As we close out the year with another surge in Covid-19 cases, it's clear there are many questions left around what a short-term and long-term airline recovery will look like. While the holiday season is off to a rough start, with the U.S. Centers for Disease Control and Prevention urging Americans not to travel for Thanksgiving, not all hope is lost. In fact, one predictive model shows that we could see a significant recovery for airline bookings as soon as in the next three to six months.

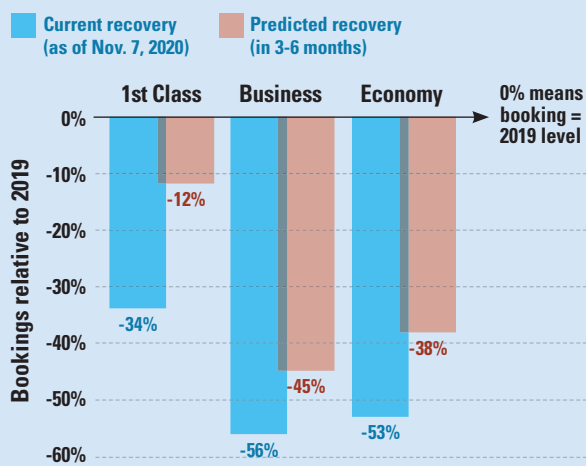
About eight months ago, AI-based data intelligence firm PROS assembled a Covid Taskforce to help airline customers cope with the pandemic. By combining opt-in demand data from about 20 global airline participants, we've created a global predictive model that will more accurately forecast when and how bookings will return. This model is truly unprecedented—airlines are hypercompetitive, and because their margins are so thin, many have been unwilling to share data in the past.

In the following predictions, all data are normalized to 2019 levels to obfuscate the market shares of airline participants. Each of these predictions for recovery three to six months out is compared to the current recovery status as of Nov. 7, 2020.

How Will Passenger Mix Fare?

It's to no one's surprise that amid lockdowns and the emergence of remote work, business travel has fallen dramatically. In three to six months, we predict a significant recovery (around 22 percent) of first-class passengers. However, business- and economy-class passengers will only recover about half of this amount (relative to 2019). Perhaps flying is now reserved for those who have the means to do so as in the early days of our aviation history.

Predicted Recovery vs. Current Status by Compartment



Michael Wu is the chief AI officer for AI-based data intelligence firm PROS.

Only time will tell if our predictions will become a reality, but based on our findings science, the future of airline bookings doesn't look as bleak as others may have suspected.

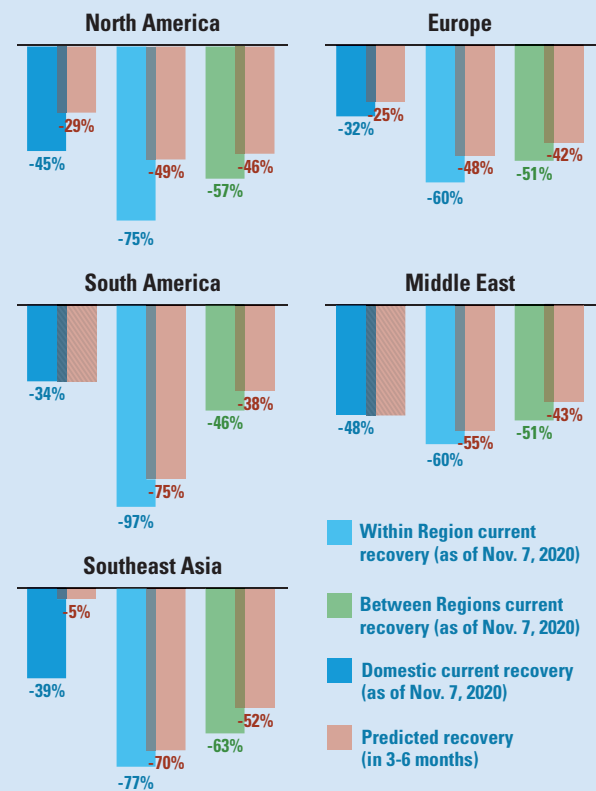
Which Regions Have the Strongest Flight Recovery?

We also took a look at how flight recovery will fare across five regions: North America, South America, Europe, Middle East, and Southeast Asia, and analyzed three types of flights: **domestic**, international **within a region (intraregional)** and international **between regions (interregional)**.

Domestic flights are currently seeing the most recovery, followed by interregional, and then intraregional flights. This pattern is persistent in our predicted recovery three to six months out.

In the next few months, we can expect to see a fair-

Predicted Recovery in Different Regions by Flight Type (%Δ in 2019)



ly consistent (~10 percent) recovery for interregional flights across all regions. Intraregional flights, on the other hand, will be more variable, ranging from ~5 percent in the Middle East to ~25 percent in North America. This variability is even more pronounced for domestic flights, ranging from ~5 percent for Europe to ~35 percent in Southeast Asia.

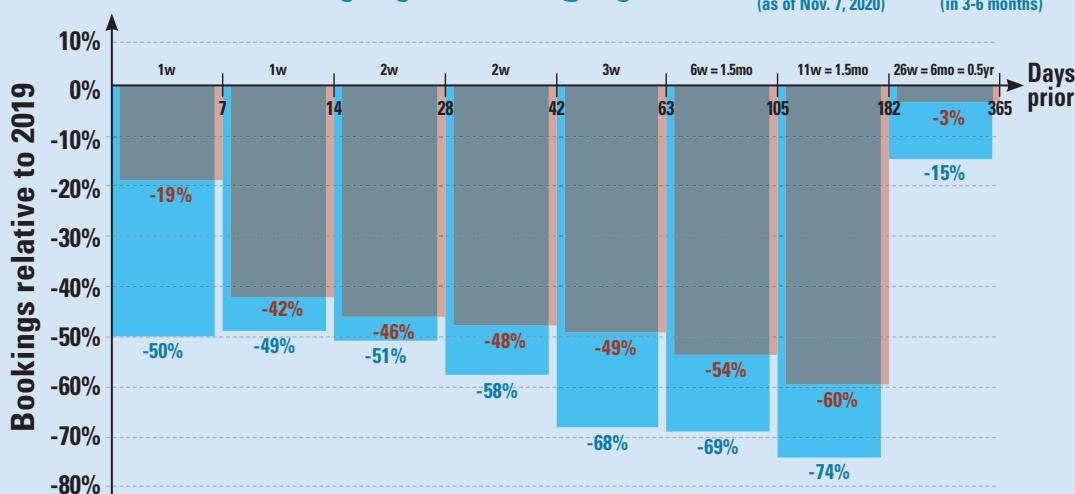
Based on our model, we expect to see a near full recovery for Southeast Asia domestic flights to a level that is only 5 percent below the 2019 level. One major factor at play is the cultural advantage in Southeast Asian countries (e.g. mask wearing) that allows them to more effectively curb the spread of Covid-19.

Bookings More than Six Months Out Will Fully Recover

What will airline booking and desire for travel look like in the future? Since people can book flights up to

Business Travel News (USPS 0728-870, ISSN 8750-3670) December 14, 2020 Issue 881 Vol. 37, No. 18. Business Travel News is published monthly except semi-monthly in March, April, June, August, October and November by Northstar Travel Media, LLC, 100 Lighting Way, Secaucus, NJ 07094 (201) 902-2000, and is distributed free of charge to qualified corporate travel buyers and travel agents specializing in business travel in the United States and Canada. The cost of a print subscription to non-qualified subscribers is \$129 in the U.S.; \$142 in Canada and Mexico; and \$205 in other foreign locations; the cost of a digital edition subscription is \$65; payable in advance in U.S. dollars. Registered for GST as Northstar Travel Media USA GST No. 264513185. Canadian GST #123397457. Periodicals postage paid at Newark, NJ, and additional mailing offices. Business Travel News is a trademark owned exclusively by Northstar Travel Media. Copyright © 2020 by Northstar Travel Media, LLC. Reproduction of this magazine, in whole or in part, is prohibited unless authorized by the publisher. Editorial and advertising offices: 100 Lighting Way, Secaucus, NJ 07094. For all circulation inquiries, including new subscriptions, renewals, cancellations, changes of address and problems with missed deliveries, contact customer service by mail at Business Travel News, P.O. Box 2007, Skokie, IL 60076; by phone at (800) 231-3776; fax at (847) 291-4816; e-mail at btn@omeda.com; or www.businesstravelnews.com/subscribe. POSTMASTER: Send change of address to Business Travel News, P.O. Box 2007, Skokie, IL 60076. Printed in the USA.

Predicted Recovery by Booking Cycle



one year before their departure date, and there tend to be much fewer bookings for a further-out travel date, it's a common practice to bucket the number of booking in days-prior to the travel date into timeframes of different length.

We are currently seeing a roughly 50 percent to 75 percent drop in booking relative to 2019 in all bookings up to 6-months before the travel date. But we are only seeing a modest drop of 15 percent for travels that are more than six months out.

In three to six months, however, we can expect to see a significant bookings recovery (around 30 percent) for travels within one week. In uncer-

tain times, people tend to book much closer to the travel date. For travels more than one week out (up to six months), we will see a 5 percent to 20 percent recovery from the current status. And, for bookings for travel more than six months out, we are predicting only 3 percent below 2019 levels—meaning a nearly complete recovery.

This is good news for the travel industry, because it shows that there is still a strong appetite for travel. However, the fact that these bookings are for travel far in the future means consumers also have a lot of time to change or even cancel these bookings. So if airlines are

offering no penalty for cancellation, this predicted full recovery in bookings (as real and accurate as it may be), could merely be a reflection of consumers taking advantage of these flexible cancellation policies.

A Unique and Unprecedented Approach

How do we know these predictions are accurate? We've built a booking-prediction model using a highly flexible machine learning model (i.e. random forest) that, in theory, can model any data. This model has been trained and tested with three major data sources: aggregating booking data (approximately 625 million bookings globally, and growing at approximately 13.9 million bookings every week) from airlines, epidemic data from Johns Hopkins University and government response data from Oxford University.

To make predictions about future bookings, we also leveraged data from the Institute for Health Metrics and Evaluation of the University of Washington's medical school to help forecast the coronavirus epidemic and estimate governments' response with cell phone mobility data. By combining all of these data sources, our model is able more accurately reflect reality.

Only time will tell if our predictions will become a reality, but based on our findings rooted in data science, the future of airline bookings doesn't look as bleak as others may have suspected. ■

BTNGROUP

Louis Magliaro, Executive Vice President & Group Publisher
973.769.0028 • lmagliaro@thebtngroup.com

EDITORIAL

Elizabeth West
Editorial Director
732.494.1955 • ewest@thebtngroup.com

Jay Boehmer
Editor-in-Chief, The Beat
646.380.6249 • jboehmer@thebtngroup.com

Chris Davis
Managing Editor
646.380.6248 • cdavis@thebtngroup.com

Michael B. Baker
Senior Editor, Transportation
646.380.6250 • mbaker@thebtngroup.com

Donna M. Airoldi
Senior Editor, Lodging & Meetings
646.380.6264 • dairoldi@thebtngroup.com

Adam Perrotta
Editor, Payment & Technology
518.859.5117 • aperrotta@thebtngroup.com

Dawit Habtemariam
Staff Writer & Assistant Editor
646.380.6267 • dhabtemariam@thebtngroup.com

James Jarnot
Art Director
646.380.6252 • jjarnot@thebtngroup.com

DIGITAL

Alexandra Mancini
Digital Director
201.902.1984 • amancini@thebtngroup.com

SALES

Lindsay Straub
Associate Publisher
646.380.6274 • lstraub@thebtngroup.com

Rich Markus
Business Development Director
301.944.4324 • rmarkus@thebtngroup.com

Claire LaVelle
Business Development Coordinator
646.380.6271 • clavelle@thebtngroup.com

Debbie Anderson
Hawaii
808.739.2200 • debbieanderson@dmhawaii.com

Michiko Kawano
Japan • +81-3-3661-6138 • kawano-pbi@gol.com

Lavender Tan
Singapore
(65) 9752 8613 • lavtan@singnet.com.sg

PRODUCTION

Michele Garth
Production Manager
201.902.1930 • mgarth@ntmlc.com

Lisa Gonzales
Gayle Graizzaro
Production Specialists
201.902.2000
lgonzales@ntmlc.com • ggraizzaro@ntmlc.com

CONFERENCES & CONTENT SOLUTIONS

David Meyer
Executive Director of Conference Content & Strategy
646.380.6246 • dmeyer@thebtngroup.com

Mary Ann McNulty
Executive Director of Content Solutions
630.519.4510 • mmculty@thebtngroup.com

Jen Bankard
Director of Content Solutions & Conferences
717.460.1091 • jbankard@thebtngroup.com

Melissa Gain
Event Manager
917.626.6832 • mgain@thebtngroup.com

Mariza Moreira
Group Design Manager
201.902.1965 • mmoreira@ntmlc.com

MARKETING

Max Bzdyk
Marketing Manager
646.346.5676 • mbzdyk@thebtngroup.com

LIST RENTAL & Reprints
Danielle Zaborski • MeritDirect for list rental
914.368.1090 • dzaborski@meritdirect.com

Robbie Ray • Wright's Media for reprints
877.652.5295 • northstar@wrightsmedia.com

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Thomas L. Kemp
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BTN Europe is set to serve a wider market and audience with expanded content, more analysis and new digital products

Being Business Travel News rebranded to Business Travel News Europe (BTN Europe). The new look follows Northern Travel Europe magazine of Europe Business Travel and the Business Travel News from Brussels Media at the end of last year.

BTN Europe will continue to be a bi-monthly magazine and will complement other titles within Northern's BTN Group, including Business Travel News, Travel Procurement and The Beat, as well as weekly regional UK, events, The Business Travel Show, Travel Technology Europe and The Beatage Show.

BTN Europe will serve both the UK and European corporate travel market, and later this year launch a new series of award-winning professional events.

In a new website, businesstravelnewseurope.com has also launched, incorporating BTN Europe content they represent around travel, as well as content from Business Travel (BTN) and Northern's other titles, which BTN acquired along with The Business Travel Show. Following the acquisition the new website will be available in both of these websites will no longer be available.

Elizabeth New, BTN Group's editorial director, said: "Business Travel News is excited to merge two of the most respected content sources in the UK market and to have the opportunity to expand our reach. Emotionally, these two groups had to engage with our English, Dutch, French, German, Italian and Spanish colleagues and beyond. But our focus is also looking at how we can diversify our editorial and content products in Europe and make them so fit your specific needs. If we do our job right, we can help you to make your job easier - sharing market intelligence, industry engagement and leading-edge innovation in travel management."

"BTN's growth also leads us to see how to improve our operations, and I look forward to offering more research and editorial content to our long-standing audience."

Stefan Brown, BTN Europe digital editor, added: "We really excited about what the future holds for our site as part of the BTN Group. We have so much planned - over a depth breadth of the best industry content."

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