

BTN

BUSINESS TRAVEL NEWS

March 7, 2022

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BTNGROUP

EXECUTIVE VICE PRESIDENT & GROUP PUBLISHER
LOUIS MAGLIARO • lmagliaro@thebtngroup.com • 973.769.0028

VICE PRESIDENT SALES, BTN GROUP
LINDSAY STRAUB • lstraub@thebtngroup.com • 646.380.6274

BUSINESS DEVELOPMENT DIRECTOR
RICH MARKUS • rmarkus@thebtngroup.com • 301.944.4324

EVENT MANAGER
CLAIRE LAVELLE • clavelle@thebtngroup.com • 646.380.6271

EXECUTIVE DIRECTOR, CONFERENCE CONTENT & STRATEGY
DAVID MEYER • dmeyer@thebtngroup.com • 646.380.6246

EXECUTIVE DIRECTOR, CONTENT SOLUTIONS
MARY ANN MCNULTY • mmcnulty@thebtngroup.com • 630.519.4510

SENIOR DIRECTOR OF CONTENT SOLUTIONS & CONFERENCES
JEN BANKARD • jbankard@thebtngroup.com • 717.460.1091

GROUP DESIGN MANAGER
MARIZA MOREIRA • mmoreira@ntmlc.com • 201.902.1965

MARKETING MANAGER
MAX BZDYK • mbzdyk@thebtngroup.com • 646.346.5676

SENIOR DIGITAL DIRECTOR
ALEXANDRA MANCINI • amancini@thebtngroup.com • 201.902.1984

PRODUCTION MANAGER
MICHELE GARTH • mgarth@ntmlc.com

PRODUCTION SPECIALIST
LISA GONZALES • lgonzales@ntmlc.com

PRODUCTION SPECIALIST
GAYLE GRAIZZARO • ggraizzaro@ntmlc.com



100 LIGHTING WAY, 2ND FLOOR, SECAUCUS, NJ 07094
WWW.NORTHSTARTRAVELGROUP.COM

CHAIRMAN & CHIEF EXECUTIVE OFFICER
THOMAS L. KEMP

CHIEF FINANCIAL OFFICER
LISA COHEN

PRESIDENT, TRAVEL GROUP
ROBERT G. SULLIVAN

EXECUTIVE VICE PRESIDENT & GROUP PUBLISHER
DAVID BLANSFIELD

EXECUTIVE VICE PRESIDENT & EDITORIAL DIRECTOR
ARNIE WEISSMANN

SENIOR VICE PRESIDENT, HUMAN RESOURCES
JANINE L. BAVOSO

SENIOR VICE PRESIDENT, PRODUCT DEVELOPMENT & PRODUCTION
ROBERTA MULLER

SENIOR VICE PRESIDENT, TECHNOLOGY
ANKEET PATEL

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SHEILA RICE

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SPONSOR WELCOME LETTER



Dear Friends,

Major disruptions have a way of shining a light on things we may have previously overlooked. They can open our eyes to what can be done differently—and better. So, before you dive into all the impressive technologies described in these pages, you might want to reconsider your

requirements for today's landscape. Remember, your travelers may have very different circumstances now. They likely need different information, guidance, and communication.

Talking with your travelers can help you determine what's needed. The future of business travel is, in part, about empowering them with technology and helping them be more productive from anywhere. Exceeding their booking expectations with excellent technology experiences will keep them on platform, making your other objectives a lot easier to achieve.

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And now, we've added Uber for Business inside Etta. Travelers can conveniently get a ride using the same platform they use for all their travel needs. The Uber integration also provides visibility into a large part of your travelers' mobility needs and spending.

Everyone is more hopeful and excited about in-person meetings and conferences these days. We are, too. And we're eager to continue creating new technologies that empower you, your business, and your travelers.

Sincerely,

David Grace
President
Deem

EDITOR'S LETTER

Knowing the Options

When I began covering business travel in 2008, online booking tools weren't exactly a new idea, but they weren't a default option for every company either. There was still a lot of chatter about pushing travelers away from live agent bookings and onto digital platforms, mostly to save money.

We were clawing our way out of the financial crash, and the focus on travel costs was ferocious. We compared agent-assisted booking fees to online booking fees. We talked about "touched" and "touchless" bookings and we talked about the concept of visual guilt. That was a big one—the idea that a traveler would see the prices of their different options side by side, and the 'guilt' associated with not taking the cheapest option would keep spending in check.

We've realized since those early days of corporate online bookings there's a lot of other important information that should be presented at the point of sale—and we are looking to our online booking tools to enable that information, present it to bookers in an elegant way and, when necessary, provide the stop signs, messaging and workflows to get them to the right choice quickly and painlessly.

And also, if it's not too much trouble, that needs to include comprehensive travel content, in a mobile experience on a tiny screen and delivered in a way that is personalized for the traveler.

To be honest, that's asking a lot. But in the past several years, online booking tool providers have innovated toward achieving those goals. They've activated new content sources, but also employed stated traveler preferences and machine learning to understand travel patterns and deliver tailored choices. Some have incorporated configurable messaging through the booking workflow, or incorporated new contextual data—recently, Covid-19-related information and sustainability data—to enable smarter bookings that support personal risk decisions and larger strategic goals.

In this guide, BTN hopes to help buyers looking for a new online booking tool—or those potentially in the market for the first time—understand how booking tools are functioning today and how organizations, program administrators and travelers stand to gain from effective travel booking tools.

Of course, the real question is which tool will best deliver on those needs. That answer will be different for each buyer using this guide.

To kickstart the process, BTN has provided in this issue a sentiment survey about how travel managers feel about their current tools and what they look for in a booking tool provider. Starting on page 23, we've also compiled profiles of 11 major tools in the market now. We've asked suppliers themselves about their offerings and followed up on those statements with comments from current clients as well as from consultants who have broader insights into which tools are winning bids and which are best positioned to serve certain types of clients or specific regions.

We learned a lot in the process and hope you can too.



Travel well,

Editorial Director, BTN Group

EDITORIAL DIRECTOR

ELIZABETH WEST

ewest@thebtngroup.com
732.207.6318

EDITOR-IN-CHIEF, THE BEAT

JAY BOEHMER

jboehmer@thebtngroup.com
646.380.6249

MANAGING EDITOR

CHRIS DAVIS

cdavis@thebtngroup.com
646.380.6248

EXECUTIVE EDITOR

MICHAEL B. BAKER

mbaker@thebtngroup.com
646.380.6250

SENIOR EDITOR

DONNA M. AIROLDI

dairoldi@thebtngroup.com
646.380.6264

SR. LODGING & MEETINGS EDITOR

TERRI HARDIN

thardin@thebtngroup.com

ART DIRECTOR

JAMES JARNOT

jjarnot@thebtngroup.com
646.380.6252

BTNGROUP

The BTN Group also publishes:

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BTN TRAVEL MANAGEMENT
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SUBSCRIPTION SERVICES

800.231.3776 • trp@omeda.com
Travel Procurement
P.O. Box 2007, Skokie, IL 60076-2007
<https://ntg.dragonforms.com/init.do?omedasite=TRPnew>

REPRINTS

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

LIST RENTAL

Danielle Zaborski • MeritDirect
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- Sabrina Hinke, Travel Manager - Americas, Mondelez Brazil

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OBT's Recovery Challenge

COMPANIES' POST-COVID TRAVEL STRATEGIES WILL LOOK TO LEVERAGE BOOKING TOOLS IN NEW WAYS.

BY CHRIS DAVIS

The first steps by many companies out of pandemic-era work restrictions toward a new normal are underway: Some offices are reopening, some mask regulations are disappearing, and business travel willingness and volume appear to be on the rise. But after a two-year bout with the effects of Covid-19, there's no real consensus on how business operations, and business travel, will look in this new normal. What is clear, though, is that whether organizations look to hew as much to 2019 strategy as possible, create an entirely new hybrid and remote structure or something in between, they very likely will require their online booking tool to play a key role in strategy dissemination and enforcement.

And therein lies the challenge for online booking tools in 2022. Corporations will have many paths to choose from in designing a new post-Covid travel program and many potential policies to implement to further that strategy, and it will be up to booking tool suppliers to ensure the technology is flexible enough to accommodate all of them.

For example, some companies have developed or are considering policies that permit only those employees fully vaccinated against Covid-19 to travel for business or attend meetings in person. While approaches to enforcing that policy vary, the online booking tool likely would serve as a key component, allowing booking only to eligible employees. Tammy Krings, founder and CEO of travel management company ATG, last fall told BTN that the company's profile management system interfaces with online booking tools to allow bookings only if the appropriate profile field includes vaccination information.

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As OBT Air Displays Evolve, Disputes Remain

The question of how best to display air content within online booking tools has been in dispute since the technology's introduction, and arguments remain today. As carriers increased their merchandizing capabilities and evolved their fare and service-class offerings over the years, displaying that content in a manner that detailed the offerings while fairly and accurately comparing fare options among multiple airlines proved challenging.

In recent years, ATPCO, the company that collects and distributes from airlines travel fares and associated data, developed what it called the Next Generation Storefront, in which flight search results are arranged in columns of "shelves" of comparable but competing airline offers. The goal, according to ATPCO, was to "ensure like-type products are consistently presented on the same shelf."

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- Zeno



The profile list for this issue that begins on page 23 was curated to represent the tools most active in N. American bids, according to corporate travel consulting firms interviewed by BTN. Visit BTN's dedicated 2022 Essential Guide to OBTs microsite at business-travel-news.com to find additional profiles for Atriiis, MyCWT, R&M/Book by Reed & Mackay, TripSource by BCD Travel and WhereTo by FCM.

New OBT Players

Technology innovators are disrupting the corporate online booking space. While BTN didn't profile these players, their fresh features and strategies will influence how the industry moves forward. Read more on page 10.

BALDWIN

Introduced in November by travel management company ATG, the company says this tool will tap deeply into personalized travel data as well as ATG's detailed profile system to create "smart-booking."

COUPA

Traditionally a procurement and expense platform, this U.S.-based company recently bought award-winning candidate and guest travel platform Pana. What happens next?

PSGR1

Recent "People's Choice" winner at BTN's Innovate Conference, PSGR1 wants travel booking to be intuitive and more collaborative for work colleagues and teams.

SPOTNANA

This startup came out of stealth mode in September with \$34 million in backing from Concur co-founder and tech veteran Steve Singh's Medrona Venture Group.



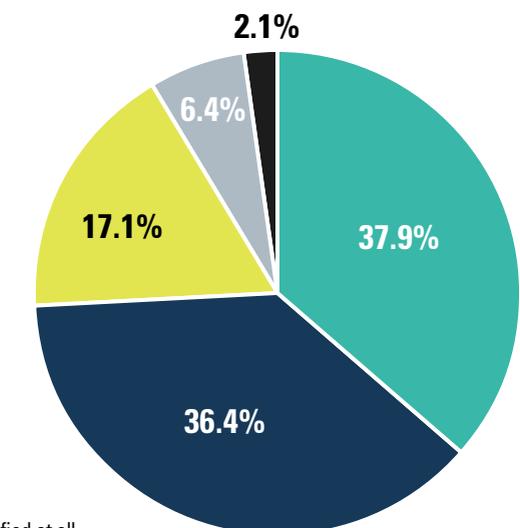
BTN's OBT Survey Methodology

BusinessTravel News conducted two surveys to inform this special online booking issue. The first surveyed suppliers about their booking tool offerings and served as the foundation for our profile section that starts on page 23. The second surveyed 150 buyers of online booking tools to understand how they prioritized their needs when vetting provider options. The survey also collected buyer sentiments about current OBT functionality and partner relationships. BTN conducted the surveys from November 2021 through February 2022.

How satisfied are you with your online booking tool?

It's not that bad out there in OBT land. Nearly three-quarters of buyers are satisfied with their online booking tool. That said, OBT providers are competing aggressively for those buyers looking to change technologies and for that relatively open, but unknown market of small- and midsize clients that may be approaching managed business travel for the first time.

● Very Satisfied ● Satisfied ● Neutral ● Unsatisfied ● Not satisfied at all



TripActions Acquires Sweden-Based Resia



Ramp Launches Travel Solution, Partner Program



Coupa Expands into Travel with Booking Module



U.S. Bank Parent Company to Acquire TravelBank



CWT Sets Priorities for \$100 Million Platform Investment

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OBT's Recovery Challenge

Additionally, online booking tools likely will need to be part of new structures that require additional approval to travel. According to a survey conducted Sept. 20-Oct. 3, 2021, of 161 U.S. and Canadian member corporate travel managers surveyed by the Global Business Travel Association in research sponsored by booking tool supplier Serko, more than 40 percent of those respondents who require manual approval of business travel now require the approval of multiple people. The booking tool would be a factor in the enforcement of this policy, limiting booking to those who have received the approval.

Some post-pandemic policy trends extend to the booking tool itself. According to the GBTA/Serko survey, 71 percent of travel manager respondents indicated their companies have implemented stricter booking-related policies during the pandemic, and 46 percent called reducing "leakage"—employee travel bookings outside of preferred channels—was a "greater" or "much greater" priority than it was before the pandemic. Another 40 percent said it held the same priority.

A world in which corporations are creating policies to funnel more bookings through online booking tools should also be a world in which the online booking tools are inviting hubs for employees, easy to use with all requisite content. But for years some buyers and travelers alike have pointed to clunky user experiences with inconsistent technology and limited content, underwhelming users accustomed to leisure-focused consumer travel booking tools. It will be another challenge to booking tool suppliers to ensure the user experience is such that it can attract—or at least not repel—employee users to remain in channel compliance.

Part of that challenge will be to impart to users new sources of information. Users could need to know international or local travel restrictions and regulations related to Covid-19, as well as the carbon-emission effects of their planned travel route. For some companies, the latter could well prove one more challenge to the online booking tool—helping users decide whether to travel at all. ■

CONTINUED FROM PAGE 6

As OBT Air Displays Evolve, Disputes Remain

ATPCO last year decided to move away from assigning shelving placement, but the NGS concept drew some supporters, including Sabre, which developed its own New Airline Storefront display, and Delta Air Lines.

Delta pushed the NGS concept as a method to show the fare brands, bundles and products airlines offer. According to BTN portfolio mate The Beat, these displays have been a point of emphasis in Delta's relationships with booking tools. Delta in 2019 pulled content from travel management company TripActions, only to restore access after it adopted Delta-approved displays. Smaller corporate booking tech providers have characterized acquiescence to Delta's display preferences as a prerequisite to list the carrier.

A December report in The Beat characterized Delta's frustration with SAP's Concur Travel, the corporate booking tool with the largest share of the global market, over its display philosophy.

"We all know that there's one large booking tool that a lot of this entire ecosystem is dependent on, and we'd love to see some modernization taking place with that booking tool," Delta managing director of global distribution Jeff Lobl said in November during a Delta-sponsored BTN Group webinar. "We've had discussions with them. I think it's starting to resonate that there's an opportunity to better service customers. And so we're hopeful that things will evolve. But even before it does, there's other booking tools out there making real investments and bringing better products and better displays to travelers."

Other major corporate booking tools are "making the right investments," Lobl said in a follow-up call with The Beat.

"We've had a lot of discussions with Concur," Lobl told The Beat. "At points in time, they say the right thing, but their ability to turn words into action is where the problem is. I think they get it now, but they're not putting their money where their mouth is like many others are."

Mike Koetting, at the time SAP Concur's solution area leader and senior vice president in a statement offered: "We are actively adding engineering resources dedicated to the re-platforming of Concur Travel, and look forward to launching new shopping experiences in 2022."

Koetting's statement also referenced the sizable market SAP Concur commands. "Concur Travel and Expense remain the world's most widely adopted corporate T&E solutions, with 51.5 percent market share according to IDC," according to his statement. Koetting departed SAP on Feb. 15.

During the BTN webinar, Lobl said, "Even in today's world, there's a lot more available to customers than can be seen in most of the online booking tools." These include "offers that are out there for a higher level of service—sitting in more premium products, extra legroom, bigger seats and the like," he said, adding such products "are priced to sell" and "many of those are well within travel policy. You just can't see them."

This article was adapted from one that originally ran in BTN's portfolio mate, The Beat. You can subscribe to The Beat @ www.thebeat.travel

Deem

Striving for growth involves change, risk, big ideas, and new strategies. Today, progressive travel managers are ensuring their organizations are ready for their next phase by thinking, planning, and building digitally for their travel program. Businesses—and their travel programs—must evolve to thrive, and digital transformation is changing the way business and travel gets done today.

Why Go Digital?

Digital transformation involves applying modern technology to create new business processes. In the face of changing requirements, the ability to re-think processes to improve performance can be a deciding factor in which businesses grow and what travel programs are successful.

Travelers won't buy into a program that includes outdated technology. You need to provide a modern environment that is flexible enough to pivot quickly and easily. It's best practice to define the travel technology strategy first, prioritizing mobile and online booking platforms that can help travelers make better decisions.

Keeping employees on platform to plan, book, and modify travel means getting the technology and user experience right. Best-in-class platforms include capabilities that drive visibility into your travel program, prevent policy violations, and help you and your team make smarter decisions.

Moving on Mobility

As employees adopt new behaviors in their personal lives, such as using an app-based rental bicycle or scooter, they'll start to expect access to multi-modal options within their corporate travel technology as well.



Travel technology can and must adapt to new situations, and a best-in-class solution should grow with the demands of travelers. It can even exceed their expectations. As an example, when a ride-hail service is included in the corporate booking technology, the system has details of their entire trip and can proactively remind travelers that they need a ride to the airport. The platform becomes more of a travel companion than just a booking tool.



With a focus toward digitization, travel managers and finance leaders can win traveler confidence and increase their satisfaction. When aligned with a comprehensive digital strategy, organizations can meaningfully boost productivity, improve management of travel costs and efficiencies, and better support their travelers.

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New OBT Players

They're too new to the market for BTN to create full product profiles, but these new players (with some heavy-hitting credentials behind them) are innovating in ways that will challenge the market.



Baldwin
BY ATG
CEO Tammy Krings

WHO: Travel management company ATG provides Baldwin. The tool is available only to ATG clients currently.

WHEN: The tool launched in November 2021. It was developed during Covid-19 when the company decided to double down on technology investment.

WHAT: According to ATG, Baldwin delivers bespoke door-to-door itineraries, including rail and car. ATG no longer thinks about travel booking as "shopping" and aims to deliver a "smart" booking on the first result.

HOW: Baldwin works with ATG profile systems and machine learning to understand the traveler based on historic travel patterns and company travel patterns. Krings called the content strategy "completely plug and play" to serve global clients with local needs.



PSNGR 1
BY PSNGR 1
CEO Chris Moss

WHO: PSNGR 1 is a start-up corporate travel tech firm.

WHEN: Founded in 2015, but came into its own last year, winning the "People's Choice" award at BTN's Innovate Conference.

WHAT: PSNGR 1 offer a next-generation storefront compatible with ATPCO requirements. The booking platform enables collaborative trip planning that allows users to duplicate bookings and add trip events like meals or meetings to a joint itinerary with individual travel records that are serviced separately by the TMC. It also enables "micro-contracting" to boost buyer-supplier relationships.

HOW: PSNGR 1 claims a "source agnostic" approach to content, and recently did direct-connect deals with seven carriers. It also has a new deal with TMC TakeTwo.



Coupa
BY COUPA
CEO Rob Bernshteyn

WHO: Coupa has been a respected procure-to-pay and expense technology provider. It acquired the award-winning, start-up candidate booking tool Pana in March 2021.

WHEN: Coupa announced its new travel booking module in February 2022.

WHAT: Coupa's travel module enables trip planning with the help of itinerary suggestions tailored to the individual, one of Pana's key features. Upon booking, it creates line items in an expense report based on the selections. The Travel Saver tool, built from Coupa's 2020 Yapta acquisition, monitors bookings for price changes in case there's a chance for savings with rebooking.

HOW: Sabre is providing content for the tool, and Coupa also has partnered with Travel Leaders Corporate to provide around-the-clock live agent assistance.



Spotnana
BY SPOTNANA
CEO Sarosh Waghmar

WHO: Former WTMC CEO Sarosh Waghmar attracted Concur co-founder Steve Singh and has partnered with innovation heavy weight Johnny Thorsen on this new venture, funded by Singh's Medrona Ventures Group.

WHEN: Came out of stealth mode in September 2021.

WHAT: Spotnana is an ecosystem provider that aims to bring harmony to GDS, midoffice, OBT and TMC service, which Singh characterized to BTN in as "having different motivations." The tech start-up says it will leverage cloud-based network technology to offer a "full range of functionality... that integrates content from any source, but yet is also configurable."

HOW: Claims it has 50 corporate clients and it will also sell to TMCs. It has made no partner announcements.

Online booking tools are changing. The changes are too fast for some but may not be fast enough for others. Recent developments like the launch of online travel management platforms, the emergence of new machine-learning driven profile engines, the nascent rumblings of transformative omnichannel booking ecosystems... what does it all mean and how do travel buyers making decisions today justify the purchase of newer, better, faster booking tools?

The truth is, they often don't.

Some travelers may yearn for a better business travel booking experience and they may complain that their corporate booking tools look and feel old, or don't have that consumer experience of going to Amazon and finding recommendations or going to travel dot-com site and being asked if they want to book that same itinerary again or a new one. They want that feeling of being remembered and valued during the shopping experience—and their current corporate tool may fall short.

Other travelers may say they want that, but when it comes time to change, they just want to know how the new tool is going to force them to learn something new that isn't core to their job. And travel managers will have to argue that a new option would be worth it.

And it's not just travelers program administrators need to convince. There's executive leadership, procurement, finance, HR... the list goes on. Yes, definitely IT gets involved. In many cases, finance may be calling the shots—and they want a tool that's compatible with their current expense and enterprise management systems, something that will help them reconcile, something that helps smooth payment processes. Travel booking tools intersect with all that technology and that can definitely slow down the change process. But even when a travel manager gets a chance... some may hesitate.

One experienced travel manager speaking to BTN on background because they didn't want to announce they were going into a Q2 OBT request-for-information process put it this way:

"I'd love to say, 'Just trust me. This

is going to be worth it.' But I need to make sure that I bring a product that when I say, 'trust me,' I can put my reputation on that, internally. That's a little scary sometimes. I'm willing to do it. But I have to have a tool that someone will look at and go, 'Oh my goodness, I don't know how I did my job before this.' And I don't know if there is [a booking tool] out there right now that offers that."

That said, the buyer is ready to find out more, and plenty of established travel technology companies (think: Amadeus, Sabre and others), start-up technologists, travel management companies and even stealth-mode players are trying to capture that business—even after corporate travel went into silent mode during Covid-19.

These players want to be ready when the market awakens and demand returns with new requirements for individual travelers who have new concerns about business travel—like health and sustainability. They want to be ready for new types of clients and potentially smaller and midsize companies who want to manage travel and centralize the booking process for the first time. They want to be ready for enterprise clients who've realized in the downtime that changing workplace configurations and digitization is the future, and their travel booking tools should be ready for new types of content like New Distribution Capability and increased demand for team meetings.

But how many travel program managers are ready to pursue and implement that change?

BTN's 2022 Essential Guide to Online Booking Tools is based on two surveys conducted between November 2021 and February 2022. The first survey covered the major online

BY MARK FRARY & ELIZABETH WEST

HOW BUYERS REALLY FEEL ABOUT THEIR OBTS

booking tool providers in the market—and the result of that information gathering effort informs the booking tool profiles that begin on page 23 of this special BTN issue.

The other survey covered 150 travel buyers reviewing current online booking tool experiences. Respondents were permitted to remain anonymous so they would speak the truth about their online booking tool without risking professional relationships.

BTN extended the survey process through deeper interviews with expert travel buyers and consultants throughout the United States and Europe.

Survey results showed a dynamic market with a powerful range of tools. It also showed that users of OBTS are not completely satisfied with what is currently on offer in the market today, from a functionality standpoint but also in terms of support and service.

CRITERIA FOR CHOOSING A BOOKING TOOL REVEALED

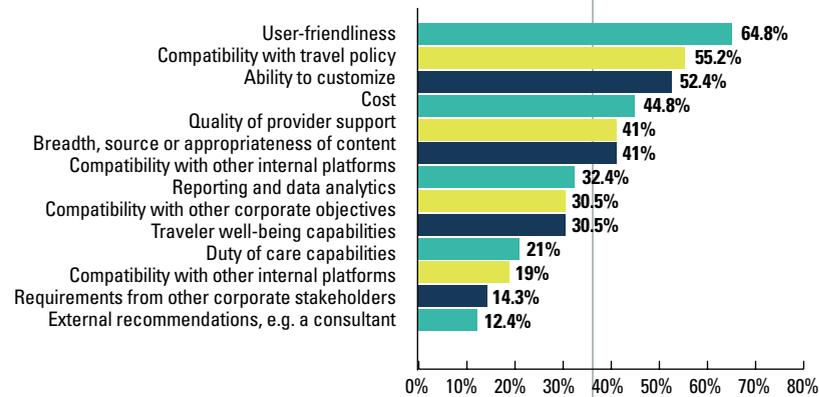
Asked why they chose their current tool, 65 percent cited user-friendliness. Travel buyers and procurement managers are keen to ensure travelers are satisfied, and in a world where individuals are accustomed to user-friendly technology in their home lives, it is no wonder program managers are trying to emulate that in the workplace, despite the challenges of doing so.

Compatibility with travel policy was a priority for 55 percent of survey respondents, signalling the critical need for travel managers to drive compliance through the travel booking workflow. A close relative—customization—came in right behind it at 52 percent as buyers look to deliver their company's branding and messaging to travelers as they walk through the booking journey.

Cost is nearly always a driver of corporate decision-making, but the BTN survey indicated this was only the fourth most important reason overall when choosing a booking tool relationship.

Other reasons for choosing tools are shown in the chart below.

Why did you choose your online booking tool?



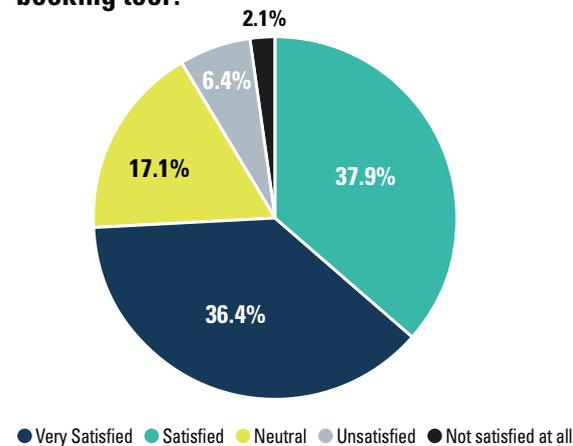
HAPPY ENOUGH?

Our survey showed that travel buyers are largely happy with their online booking tools with almost three-quarters of buyers saying they were satisfied or very satisfied. Just 2 percent said they were totally unsatisfied with their chosen OBT.

This result may point to a market in which companies that already have an established booking tool may not be looking to change. However, some buyers BTN talked to were willing to go out for RFIs either to use as leverage to influence their current provider to innovate or to see how the market is shaping up and what they need to be thinking about for the future.

On the other hand, the SME market could be heating up to partner with booking tool providers or TMCs for the first time as Covid peeled back some information and safety gaps in unmanaged travel environments. Those types of buyers are more difficult to identify and survey, but they are highly coveted by booking providers—whether independent tools or those that come joined with a TMC relationship.

How satisfied are you with your online booking tool?



CONTENT WITH YOUR CONTENT?

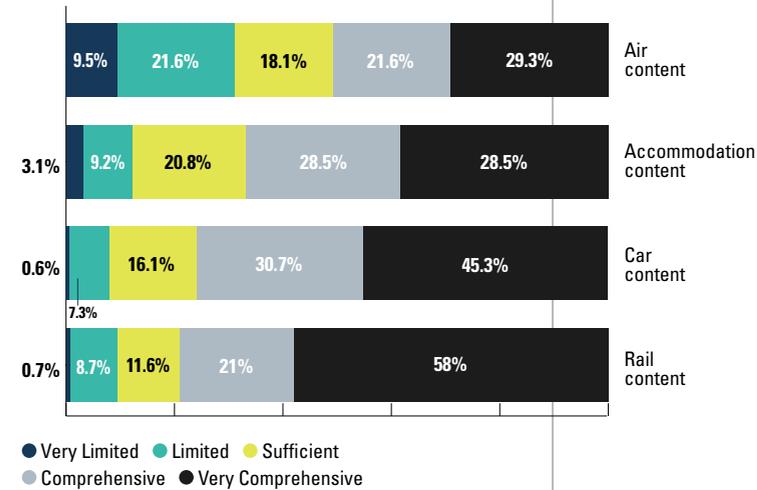
There's nothing more exasperating for a travel program manager than the phrase: "I found it cheaper online." The culprit in these scenarios is often the booking tool or booking partner's [read: TMC] limitations in gathering travel content. More than 40 percent of buyers said breadth, source and appropriateness of content is important when choosing a booking tool. Here's what we found when we asked users of these tools to dive into how comprehensively their booking tools provided content in four major categories.

The chart on the next page shows the breakdown into air, accommodation, rail and car content. Buyers were convinced that air and accommodation content were comprehensive or very comprehensive. A lack of rail content or relevant rail content was a clear problem for many travel buyers. While in the U.S., this can be chalked up to a lack of options overall, in Europe it more likely reflects the huge fragmentation in the market for train travel between countries and even within countries.

New Distribution Capability—or NDC content, as it's known in the industry—is an emerging content channel to which booking tools can forge direct connects or access through an aggregator or some GDS providers that have opened their strategies accordingly. NDC's relative nascence makes it difficult to assess

in a survey in terms of how comprehensively booking tools are set up to receive it. But it's a channel and capabilities that buyers assessing booking tools should be looking for in 2022. BTN removed it from the chart below, due to lack of reliable feedback.

How do you rate your OBT's content?

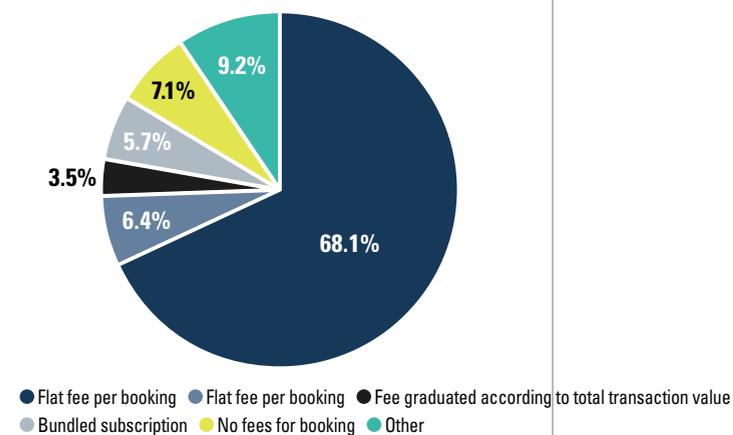


CARRYING THEIR WEIGHT IN GOLD?

BTN asked the travel buyers in its survey how their company paid for online booking tool usage. Slightly more than 53 percent said they had not paid any set-up fees when implementing their tool. About 43 percent said there were ongoing fixed costs related to using their tool, such as maintenance fees or training costs.

When we looked at the cost of making a booking, a strong majority of users (68 percent) reported that they pay a flat fee per booking. A range of other booking fee methods were available, as shown in the chart below.

The cost of making bookings

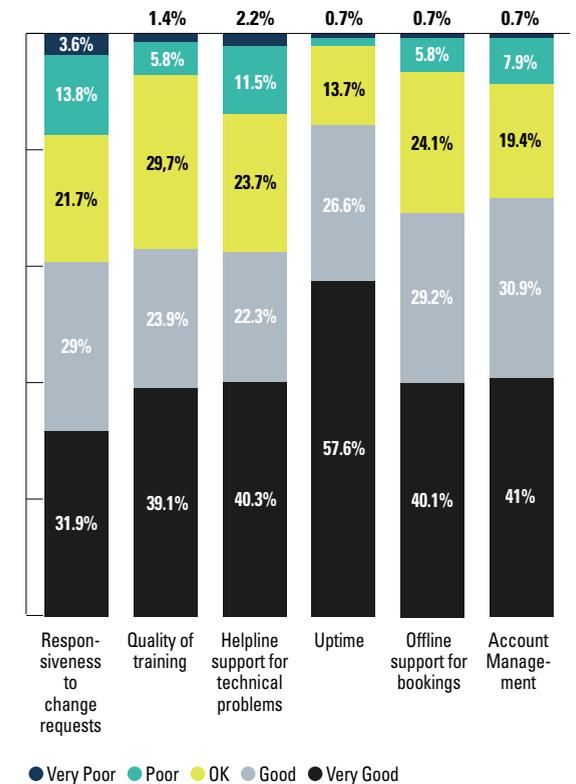


HOW DO THEY RATE?

BTN also asked corporate buyers about how they ranked their providers on a collection of key measures seen in the chart below. Of these, many users said their online booking tool providers were not responsive to change requests while others felt the training they received was not as good as it could be.

On a more technical note, most corporates said their tool enjoyed good uptime and few were left unable to make bookings at important times.

How does your provider rate on key measures?



The survey reveals that many corporates are happy with their online booking tools and the key features—content, user-friendliness and the ability to customize to a company's travel policy—meet the expectation thresholds set by the program manager. There is still room for improvement, however, and the arrival of greater competition in the market will mean providers will have to innovate faster than ever in both product and services to win clients over and capture new customers coming into the market.

You're reading this for a reason, where do you fit into the mix? ■

Choosing an online booking tool can feel as daunting as buying a new car. Do you go for the sporty number that will get you from A to B quickly but only has two seats or do you go for the SUV that has plenty of space for the luggage and extra passengers that you need on occasional journeys? That is without even thinking about whether you want an electric or gasoline-powered vehicle, the specification of the interiors and whether it should be in white or sky blue.

THE THREE CS: CONTENT, CUSTOMER EXPERIENCE, CONTROL

With so much choice, many buyers and consultants recommend focusing on a limited number of pillars. One successful approach focuses on the three Cs—content, customer experience and control.

Content

Content—the air tickets, hotel rooms, car rentals and more—is now pulled together from a wider range of sources than ever before.

Tools offered by technology companies that are also global distributions systems will naturally offer content from their parent company. These days, that content is nearly always supplemented from other sources. Frequently providers have agreements with companies that can consolidate air content from low-cost carriers and other non-GDS airlines. This may also be supplemented by direct connects with airline groups, which can be an API created by the airline or content fed through using the NDC standards.

Content in categories other than air is often provided by third parties—online travel agencies like Booking.com and Expedia for accommodation for example.

All these different content sources also mean a user might be offered numerous different rates for the same room in a chain property from different sources but then not getting rates from the smaller, independent properties.

“Content is more important than ever but it is not only about having the most content and two million search results coming out,” said Festive Road consultant Aurelie Krau.

Customer Experience

Online consumer applications in spheres other than travel, such as Amazon in e-commerce and Netflix in streaming, have spoiled us. We now demand a slick experience whenever we are online and this includes when using an OBT.

This is reflected in BTN’s research for this issue. The survey showed that user-friendliness was the most important criterion when choosing an OBT, with almost two-thirds of buyers saying it was one of the reasons they chose their particular tool, more than any other consideration.

Yet there is clearly a long way to go on customer experience. Research from Festive Road has also underlined this.

“In our own research, OBTs scored better than 50 percent in only five out of 32 user experience areas,” said Krau.

What to Prioritize in an Online Booking Tool

BY MARK FRARY

PICK YOUR CHOICE

Independent consultant Chris Pouney said, “We know in travel we are all very familiar with the consumer sites out there and therefore people are looking to implement that style of system, both in terms of look and feel as well as process flow. But there has to be a caveat. There is a fundamental difference between booking travel in a business and booking for leisure. If I go on a dot-com to buy an economy ticket to Dubai, [the supplier site] is going to try to upsell that. Within a business environment, we don’t want to upsell. We often want to challenge people as to why they are going in the first place.”

Control

Having the ability to apply the company travel policy to bookings made through the system is imperative.

Since their inception, OBTs have typically been fairly blunt tools in the travel manager’s armory, allowing for the broad implementation of travel policy rules, like class of travel and flight duration and the promotion of preferred suppliers. More nuanced control has been added as companies have demanded more precision in their policies.

Krau says that in Festive Road’s research with buyers about what they wanted from

OBTs, many buyers wanted this control to be even more dynamic than is currently available on the market.

“Many wanted a tool that is so intelligent that the control layer is controlled by AI. You could automatically approve some trips based on the ROI of the trip. They want to trust the technology and there is a gap in the market as many providers are still thinking like the old policy with old-school profiles,” she says.

The problem with control is often that if users do not like how they are being controlled, they will step outside the system, leading to leakage.

OR, IS IT ACTUALLY SIX CS? CONTEMPLATING COST, CUSTOMIZATION & COVID-19

While a consideration of the three Cs above can help corporates make a choice about their online booking tools, they are not everything. BTN’s buyer survey (see more details on page 11) revealed a number of other Cs that should be considered when choosing an OBT.

Cost

Cost has always been top-of-mind for corporate travel managers and this is no different when it comes to online booking tools.

The costs of implementing an online booking tool come in three major areas—initial set-up costs, ongoing costs related to the technology—such as training—and the costs of making a booking through the tool.

Different online booking tool providers offer different financial models. Some tools, particularly the online travel management platforms, have no set-up fees at all.

Providers are offering a growing number of ways to pay for transactions. Flat fees have always been the most popular but providers will also discuss subscription models with a number of bundled transactions or fees that operate on a sliding scale depending on the volume of transactions in any particular billing period.

What is certain is that the bigger the program, the more leverage there is to negotiate with an online booking tool provider—whether that is a technology company or a TMC.

“Cost saving is something we are moving away from,” says Chris Pouney. “You can save [using an OBT], but it is not the be-all and end-all. You can save money by making better choices, but success is about efficiency and satisfaction. Efficiency might mean be cost savings, but it could also be about booking times, turnaround times, handoff of data and integration of systems.”

Customization

Customization is also perceived to be important when choosing a tool. At its simplest, this could be making the OBT look and feel as though it is part of the organization. In the early days of OBTs this might have been as simple as putting the company logo on the front page but now might involve integrating the tool directly into a company’s travel intranet.

It now also goes beyond these cosmetic factors and into areas of policy and content—the ability to add content filtering by sustainability rating if this is important to the corporate customer or the inclusion of content that is particularly relevant, the small bed and breakfast location next to the company headquarters, for example.

Covid-19

Another C—Covid—has also changed what companies want from their OBT. At first, many companies shut down the use of their online booking tools as they shifted to a zero-travel policy or at least to essential-only travel, which often was served by live-agent bookings in an effort to deal with the sudden and intense complexities introduced by the pandemic.

At the same time, the pandemic created new requirements for OBTs themselves to deal with such complexities, and many have done so—introducing Covid-tracking data at the point of sale, but also more messaging and communication integration to educate users about shifting policies, entrance documentation or health requirements and risks associated with their travel.

As business travel restarts in earnest, companies have said they are intensely focused on traveler health, well-being and risk management. They may look to mandate the use of their OBT to better understand where their travelers are and to ensure the risks of travel have been properly communicated.

But managing risk that way also means the importance of keeping users in the tool will be at an all-time high—and that consideration may need to go back to the policy discussion, said one U.S.-based corporate travel consultant.

“The online booking and policy strategy will be shockingly different as travel comes back,” she said. “You can really over-engineer these tools to the point where travelers can’t find what they are looking for—especially now when [airline] schedules are decimated. Nobody wants to absolutely require the preferred carrier, even if the flight times are inconvenient for the traveler and even if the carbon emissions are more. The whole idea of balancing well-being, sustainability and buying

“Content is more important than ever, but it is not only about having the most content and 2 million search results coming out.”

—FESTIVE ROAD’S AURELIE KRAU

close, logical fares is huge. So for 50 percent of companies buying booking tools now, the policy buttons of all these tools may actually be less important.”

That said, what is less important now may become more important later, so finding a booking tool with granular controls may still be a priority for a purchase with long-term commitment.

WHO IS YOUR OBT PROVIDER?

When you have decided on your priorities—whether that is content, cost, control or some other combination—then the question is where to find that tool.

OBTs are brought to market in many different ways. There are technology companies, such as Amadeus and Sabre, who create their own tools, namely Cytric and GetThere, which act as storefronts for their own GDS content. These tools represented a way for companies that were primarily in the market for travel distribution revenue to keep hold of their customers when internet shopping became commonplace.

Today, corporates can choose whether they go direct to these providers—if their volume is significant enough to warrant it (like the bank UBS, see page 18). Or, more commonly, companies choose to get access to a booking tool through a reseller agreement with their TMC. The former gives the corporate most control but adds complexity in relationship management.

Corporates can also take an OBT built by their TMC. AmTrav, Corporate Travel Management and FCM, Serko and others promote in-house-developed tools, while others offer a smaller or larger selection of those from the market. Some of those TMCs will have preferred relationships with certain technology providers. Corporates must recognize that TMCs will usually work better with their preferred OBT providers. Imposing another choice on them may be counterproductive. Buyers should also understand there are commercial relationships between TMCs and tool providers that may distort what is presented as the “best” tool.

More recently, online travel management platforms that combine the role of the TMC and the online booking tool have come to the market. Egencia was the notable first in this but more recently the industry has seen the emergence of disruptive alternatives such as TripActions and Travelperk. Using one of these platforms potentially offers one-stop-shop convenience since there are no issues about the integration between the online booking tool and the TMC’s own systems—they have been designed together

“For 50 percent of the companies buying booking tools now, the policy buttons of all these tools may actually be less important.”

— U.S.-BASED CORP. TRAVEL CONSULTANT

from the ground up.

Krau said companies like TripActions and TravelPerk “are tech providers before being a travel provider,” she said. “The question whether it is a fit or not depends on company strategy.”

There is an emerging option to consider, as well. The rise in the availability of direct connects means a growing interest in developing what some call BYO or “bring your own” model. Corporates could conceivably design their own tool or platform using their own preferred partners or in-house technology development resources and get content and other services, such as risk management, from whoever is best placed in the market to provide it and is happy to offer open access.

Newcomers like Spotnana—backed by travel and expense veteran and Concur co-founder Steve Singh—are looking to develop demand and corner this market, offering a modular microservices concept, both to corporates direct and to TMCs. Some industry innovators have said this is the future of travel.

Festive Road’s Krau said, “This is related to the huge explosion in APIs and the capability to connect different services—microservices—to make whatever integrated online booking experience you want to create. This will empower travel managers and buyers like they have never been empowered before.”

The U.S.-based corporate travel consultant, who plays in the enterprise space, told BTN “all my clients” are looking at these options. Theoretically the choice isn’t limited to large companies. Indeed, it might be simpler to construct for the midmarket, but it would require a travel manager with true expertise in content, distribution and tech, which SMEs may not have invested in yet.

CUTTING DOWN CHOICE

A request for proposal—and increasingly a prior request for information—will help corporates decide on a selection of providers, whether they are tech companies, TMCs or online platforms.

“From a procurement perspective, you might run an RFI exercise in advance of an RFP,” said Pouney. You wouldn’t want a full tender with 10 OBTs—you want to get that number down to three or four.”

Corporates need to consider what elements are most important to them and their strategy and to design the scoring for their bids around those priorities. Corporates must also recognize that with technology changing so quickly, what might be right today may look outdated tomorrow. ◀

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LEARNING FROM EXPERIENCE

UBS's Kevin Carr Offers Straight Talk on OB T Partnerships

BY MARK FRARY

Swiss bank UBS has a very mature program with online booking in place for almost 15 years. Kevin Carr, the bank's corporate travel manager, said the company implemented a new online booking tool five years ago, with Amadeus' Cytric.

With the implementation, UBS moved away from different tools in different regions.

"Prior to the current partnership, we had different tools in each region, but we decided that we wanted to globalize as there are lots of benefits around having global servicing standards," he told BTN.

While Cytric is UBS's online booking tool from global distribution player Amadeus, the bank contracts directly with Travelport as its GDS and American Express Global Business Travel as its travel management company, which typically works with Sabre.

"It is ultimately about owning the relationship," says Carr. "If you have a decent-sized program, you want to be influencing the partner. You don't want the TMC to be driving that partnership and development falling onto the TMC's roadmap. You want to be influencing the provider and prioritizing your strategy."

Do you find the best TMC and best OB T and try to work them together or find the partnerships which might have some compromises or less content but is a better connection? "We have always worked at having the best in the market for that service and forcing them to work together," he said.

Carr also points out that it is clear that certain OB Ts and TMCs work better together, despite most TMCs saying they work with every tool in the market.

"This idea of being agnostic is a bit of nonsense really," he said. "Ultimately, we all know there are always complications and you do lose certain functionality and features if not using the right GDS, TMC or OB T."

DO YOUR OWN HOMEWORK

With many vested interests in the market—preferred supplier deals can distort what TMCs offer and even what consultants suggest—so buyers have to rely on other more independent sources. A good

place to start is in your personal network of buyers or through association networks like ITM or GBTA, he suggested.

Carr said, "Travel is inherently complicated because of the various commercial models, and you never know who gets what from whom."

He recommended for those not in the position to contract directly, identifying content and functionality that is a must-have for the corporate is vital since sometimes the ultimate choice will involve compromise.

"It is all about understanding what the needs of the program are: destinations and markets you want to cover," said Carr.

He added, "Rail as a specific category has become much more important because of sustainability. Whereas it might not have mattered previously if you didn't have rail in some countries, now we are very concerned to have it."

In this case, the content requirement has made choosing an OB T provider slightly easier. "Everyone has GDS, Booking.com, HRS and Expedia but not everybody has got rail," Carr said.

GET USERS INVOLVED

When UBS vetted Cytric, the bank was careful to include users of the OB T in helping specify what was required and asked travelers after each trip to score the trip and the booking experience.

"We have a category council, a sourcing group where we and the procurement function and business divisions talk about travel, the program and budgets so we have a lot of touchpoints across the business," said Carr.

Asking regular users of the online booking tool what they want can be important. In some corporates, there are groups of frequent travelers and bookers who might have input into the selection process while a survey of all travelers might throw up particular desires or concerns.

While access to the right content and user experience are crucial, Carr acknowledged they are hard to balance.

"We have two conflicting strategic objectives: We want to offer a world of choice, giving people as much content as possible, but then you have personalization, trying to personalize the offer much more to what a traveler is looking for. Which of those is

best and do we want to be responsible for taking this decision?"

Carr feels that while innovations can be quickly copied, providers are coming up with useful functionality.

"The tool we are using today is integrated into Microsoft Workplace, so it is available in Outlook and Teams. [While this] is not around the core product, it is a nice innovation [that] helps provide a more efficient and seamless experience," he said.

More can be done, he believes.

Increasingly, corporates will want their tool to present sustainability options at the point of sale, Carr said, citing demand management needs for business travel. He envisioned a configured booking tool that would ask travelers why they are traveling, whether it is necessary to travel or should they be doing a virtual meeting instead? If travel is required, the tool could then monitor flight choice—should the traveler choose this airline when the CO2 emissions on that aircraft are double those on another airline and aircraft?

"The OB T is the window into our travel program and strategy. If we want to stop people traveling on certain routes, then we want to integrate that into the shopping experience but there is only a very limited opportunity right now," said Carr.

MORE OPPORTUNITIES NOW TO FIND THE RIGHT FIT

Carr noted that even though the current tool was chosen only five years ago, things are moving quickly.

"The marketplace is rapidly changing due to more digitalization and innovation in the online booking tool and the TMC space," he said. "More consolidation across the marketplace is having a big impact. Trying to work the OB T and TMC together is always very challenging. Now buyers have the option of one partnership that could manage both."

Technology is also becoming more open, and Covid has demonstrated that the industry can work in a more collaborative fashion.

"Open technology means that as a buyer you can architect your own program and slot things together in a 'plug and play' way," he said. "But we still have the heavyweights that want you to fall into their roadmap. For example, Concur and Amex are not particularly open—they don't want to be." ■

"Ultimately, we all know there are always complications, and you do lose certain functionality and features if not using the right GDS, TMC or OB T."

—UBS'S KEVIN CARR

TAKING FLIGHT



Implementing an Online Booking Tool

BY MARK FRARY

Online booking tools are rarely “plug and play”—you can’t just switch one on and hope for the best. They are often connected to many disparate systems, often from different providers, and making them work together in harmony needs to be well planned.

It is vital that key stakeholders are involved as early as possible in the process of implementation. The technology department needs to be involved to make sure your tool can actually work properly within corporate IT networks, and this is a particular challenge with many people now working from home or hybrid working. An OBT that is perfect but can’t get past the corporate firewall is next to useless.

The IT division may also be involved in how the OBT is integrated into the corporate workspace—this could be through something like Microsoft Modern Workplace or Google’s G Suite. Other companies may instead have their employees log in through an intranet—something that the digital marketing team often manage, meaning they need to be involved in implementation.

The interface with corporate HR systems needs to be considered too. Traveler profiles are often based on employee profiles managed by the HR department. HR may have its own systems that an online booking tool will need to interface with.

The finance department will also need a seat at the table when it comes to implementation—both in terms of payment mechanisms and expense management.

“Companies in this day and age are rarely looking at just the booking component,” said independent consultant Chris Pouney. “They are looking at budgeting cycles, approvals, expense reimbursement and security. It is rarely just one person and finance is increasingly at the head of the table.”

DATA, DATA, DATA: MAKE SURE IT’S INTEGRATED

Corporations also increasingly have data analytics tools to help them understand every aspect of what they do. To make your OBT work properly, it will need to integrate with travel, expense, payment, data analytics software, finance systems and maybe an enterprise resourcing planning platform such as SAP.

“We always talk with organizations and buyers about how is this tool going to fit in with their other providers and tools,” says Festive Road’s Katie Virtue. “Broadly, you need to figure out where the tool fits in your landscape.”

If you are one of the leading-edge corporations thinking about building your own online booking tool, considering these differ-

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ent connections is crucial.

“Some corporations are getting to the point where they say they just want their own raw data to put into their own tools and dashboards and integrate it into a broader ecosystem,” says Virtue. “You are just starting to get that exploration with IT departments of what could be built.”

GET CONFIGURED

Configuring a new tool to digest a corporate travel policy comes next. All modern online booking tools can be configured to reflect your organization’s policy, whether it is a simple one-sheet list of rules such as flight duration and class and star ratings against employee seniority or something more complex and nuanced. Tuning your tool to make it work properly at this stage can make all the difference between success and failure.

It is also worthwhile at this stage involving some of your key travelers and bookers as part of a pilot group to help iron out any problems that may have been overlooked. It is worth spending some time making sure this group is representative of the company as a whole and to include both frequent travelers and occasional users as well as people with simple bookings and more complex requests to ensure that it works for everyone. Having a group of users already onboard before the tool is rolled out can really help—they can act as advocates to encourage other users and help implementation succeed.

MANAGING CHANGE

Any change to existing corporate systems will always be met with some resistance, no matter if the process or tool is ultimately better for the individual, the company or, preferably, both.

Explaining to key stakeholders why the change is happening is paramount to make sure that the implementation is not doomed from the start. Looking back to your bid document can be useful here as it will elaborate the why the company is changing in the first place. Is it because travelers need a wider range of content, a better experience or a tool to help the company reduce carbon emissions? Your strategy should be clear from this docu-

“Companies in this day and age are rarely looking at just the booking component. They are looking at budgeting cycles, approvals, expense reimbursement and security. It is rarely just one person and finance is increasingly at the head of the table.”

—CONSULTANT
CHRIS POUNEY

ment and communicating that should help smooth the transition. Users need to know what is in it for them.

Getting senior management buy-in to the reasons for the change is also important. Get the CEO or business unit leader to record a video explaining what is about to change for employees and why.

Your TMC account manager or consultant who has helped bring the project to fruition may also be able to help you with communication. It is highly likely they will have been in the same situation before and may have templates or case studies of successful communication plans that they can share with you.

NOT EVERYTHING IS INTUITIVE SO PLAN TO TRAIN

It is at this point you need to think about training your users. This could take the form of written documentation, walk-through videos or hands-on training. In some cases, you can train superusers who can then train others. Your OBT provider or TMC may have dedicated teams to help you with this.

Making sure users have everything available when they are invited to use the online booking tool for the first time can also help with adoption of the new tool. This could mean having support on hand in the early stages to walk users through a booking or setting up a dedicated email for OBT support. Many OBT providers have useful resources, such as videos to help users with the more common tasks, like making an air booking or sharing an itinerary with a team member.

Good levels of adoption and low leakage are clearly good indicators of successful implement but there are others.

“There are some interesting behavioural KPIs too, for example how many people actually booked on the system compared to just looked or how much time are travelers spending in the search,” says Festive Road’s Virtue.

The implementation may be over but online booking tools are living beasts. Use should be audited to ensure travelers are still engaged. Corporates should be ready to address user problems and assess whether lack of content is making them drift away to other booking channels. ■

ONLINE BOOKING TOOLS

PROFILES IN CORPORATE TRAVEL TECH

On the following pages, BTN profiles 11 leading and emerging corporate travel booking technologies to help you navigate the market

THE PROFILES

- A2b by AmTrav
- Concur Travel by SAP
- Cytric by Amadeus
- Egencia
- Etta by Deem
- GetThere by Sabre
- Lightning by Corporate Travel Management
- Neo by KDS/Amex GBT
- Travelperk
- TripActions
- Zeno

KEY STATS
PROVIDER
 AmTrav Business Travel

COMPANY TYPE
 Travel management company

REGIONS SERVED
 Primarily N. America

CORPORATE USERS
 1,000

TOTAL USERS/SEATS
 50,000

TOTAL ANNUAL BOOKINGS
 140,000

TOTAL TRANSACTION VOLUME ANNUALLY
 US\$150,000,000

UPDATE FREQUENCY
 Continuous / multiple updates weekly



PRICING MODEL
SET-UP FEES
 No

ONGOING FIXED COSTS
 No

TRANSACTION FEES
 Flat fee per booking



EXECUTIVE TEAM
CEO
 Jeff Klee

PRESIDENT
 Craig Fichtelberg

DIRECTOR OF PRODUCT MARKETING
 Elliott McNamee

DIRECTOR OF RELATIONSHIP MANAGEMENT
 Greg Ross

DIRECTOR OF PARTNERSHIPS
 Fran Bal



WHAT THE COMPANY SAYS

According to the company's executives, AmTrav saves clients time, headache and money by integrating travel services in one connected platform. Client relationships operate on what execs call a "simple" contract, and one login gives client teams access to all a2b/AmTrav travel tools and services including booking, service, reporting, duty of care and account management. AmTrav continually improves the a2b platform so client teams can find the itineraries they want, get accurate real-time travel and safety data and great service "whether it's noon or midnight," the company said.

A2b/AmTrav identified its biggest innovation in 2021 as its Gather tool. They called it "the modern way to book guest and meeting travel." The platform minimizes forms, phone calls and emails by operating with a travel invitation system for candidates, consultants and meeting attendees. These traveler types use the invite to book themselves within the parameters and policies set by their host, with supplier agreements and payments applied.



WHAT BUYERS SAY

Users responding to BTN's survey cited a2b's ease of use with one calling it "intuitive." Others cited the tools' reporting dashboard as a good feature while others highlighted the traveler profiles. One buyer felt it would be good to have a group travel booking option while another said the tool lacked the ability to support multiple corporate cards on the account.



WHAT CONSULTANTS SAY

A2b technology is admirable and AmTrav executives are pursuing a smart content and display strategies. Currently, the tool is appropriate for clients with small- and midsize travel programs up to about \$10 million in annual spend and concentrated in the U.S. domestic market. One consultant had A2b in an active bid.



CONTENT

Air: Global distribution system and New Distribution Capability content. Full array of air offers in display, from basic economy and economy fare brands up to premium economy, business and first class including all Southwest fares. Bookers can book for themselves or others. They can filter for details like seat type and dimensions, WiFi speed, entertainment and free bags. Travel policies, discounts and approvals are automatically applied. Unused tickets are applied with one click.

Accommodation: Bookers can see all hotels and many rates per hotel, with travel policy, approvals and negotiated rates automatically applied. Bookers can view results on a map or in a list and filter by hotel chain, star class, location and more. Virtual card and prepaid options are offered for payment, plus certain prepaid merchant rates sourced from a third party.

Rail: Pulls in Amtrak U.S. rail content, displays Amtrak itineraries and fares alongside flight options.

Car: Bookers see rental car options in a map or list display, with filters and details on car size, location, vendor, with travel policy, approvals and supplier discounts applied. AmTrav facilitates clients' direct billing agreements for rental car payment.

NDC & Direct Connect: AmTrav was the launch partner for Southwest Airlines' and American Airlines' NDC content in 2020, enabling the full array of Southwest and American flights, fares, ancillaries and corporate bundles with full operational support including exchanges, refunds and unused ticket tracking and application. Additionally, AmTrav sells Spirit Airlines content via NDC and Expedia prepaid hotel rates.

KEY STATS
PROVIDER
 SAP Concur

COMPANY TYPE
 Technology provider

REGIONS SERVED
 Global

CORPORATE USERS
 Concur Travel and Expense is the most widely adopted corporate T&E solution globally. According to IDC, it owns 51.5 percent market share.

TOTAL USERS/SEATS
 75 million+ end users booking travel and/or processing expenses

TOTAL ANNUAL BOOKINGS
 Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY
 Not disclosed

UPDATE FREQUENCY
 Monthly, on average. Open platform allows new partners to be added regularly.



EXECUTIVE TEAM
VP, GLOBAL TRAVEL STRATEGY
 Brian Hace

CHIEF OPERATING OFFICER & SVP STRATEGIC PLANNING
 Charlie Sultan

CHIEF TECHNOLOGY OFFICER:
 Fred Fredericks

CHIEF REVENUE OFFICER
 Doug Adamic



WHAT THE COMPANY SAYS

According to the company, SAP Concur offers a secure, scalable global spend management solution, providing customers with spend enablement and settlement solutions overlaid with governance, oversight and control. The integration from Concur Travel to Concur Expense and the broader suite of SAP products allows customers to have a seamless experience. Concur Travel can be used with a large number of travel management companies and all major global distribution systems. Combining Concur products with app center partner solutions allows customers the flexibility to build a "connected global digital ecosystem" that aligns with specific objectives. The company touted its award-winning Tripit app as a valuable traveler companion as companies manage the return to travel.



WHAT BUYERS SAY

A central reason for buyers using Concur is the integration with Concur's expense tool making end-to-end integration very simple, especially if the corporation is using the SAP enterprise resource planning system. Many users cited cost as a key reason for choosing the tool. A number of buyers complained that the interface is "not modern" or "old-style" and that booking takes too many clicks. Some felt that the pace of innovation was too slow and that the development cycle for seemingly simple fixes too lengthy. Several respondents to BTN's user survey said that the customization options were limited.



WHAT CONSULTANTS SAY

Customers feed off one another in terms of complaints directed at this dominant market leader, consultants acknowledged. Concur makes purchase justification, reconciliation, expense and travel reporting pretty easy if clients seamlessly connect the functions. But with their marketshare and the data they command, they could do more—including better implementation support. One problem, said every consultant BTN spoke to, is that the company leads with expense and captures travel as a secondary play. The company hasn't invested enough in travel since its acquisition by SAP. But, said one consultant, "they are now talking about upgrades and enhancements" in 2022.



CONTENT

Air: GDS agnostic and sources non-GDS content from industry leading aggregators. Air content includes all global full-service airlines and a majority of low-cost carriers. Concur also offers a TripLink product that enables connected travelers who need to book directly with key airlines to do so and still receive their corporate discounts, while enabling the travel manager to enforce travel policy and aggregate the data of direct-booked travel with OBT-booked travel. Participating suppliers include American Airlines, British Airways, Delta Airlines, Lufthansa Airlines, Southwest Airlines and United Airlines.

Accommodation: GDS, non-GDS, major aggregators such as HRS, Booking.com, global TMC aggregated hotel platforms from CWT, Amex GBT, BCD, FCM and others. TripLink direct-booking is enabled for key hotel suppliers. Participating portfolios include InterContinental Hotels, Marriott Hotels, HRS, Hyatt Hotels and Booking.com.

Rail: Rail operators in 17 markets across North America, EMEA & APAC. The most recent addition to Concur Travel's desktop and mobile solutions is Renfe in Spain which includes corporate fares, seat maps and online cancellation. TripLink direct-booking is enabled for key rail suppliers as well. Participating suppliers include Trainline and Amtrak.

Car: GDS and aggregators. The tool allows for collection & pickup, home delivery and fleet. The TripLink direct-booking solution is enabled for key car rental suppliers as well. Participating suppliers include Avis North America, Hertz and Sixt.

NDC & Direct Connect: SAP Concur uses a third-party aggregator, Travelfusion, to help enable NDC content where warranted. Current NDC content from American Airlines, British Airways, Lufthansa Group and United Airlines is available. In addition, through the TripLink product, travelers can typically obtain all the benefits of NDC content by booking directly with the participating suppliers, but TMC servicing may be limited.

CYTRIC TRAVEL & EXPENSE

KEY STATS PROVIDER
Amadeus

COMPANY TYPE
Technology provider

REGIONS SERVED
Global. 130 countries in 10 languages

CORPORATE USERS
“Thousands,” per company execs, who list as marquee examples: Bosch, Mitsubishi Fuso, Eberspächer, INEOS and FCA Services

TOTAL USERS/SEATS
Not disclosed

TOTAL ANNUAL BOOKINGS
Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY
Not disclosed

UPDATE FREQUENCY
Every seven weeks



PRICING MODEL SET-UP FEES
Yes

ONGOING FIXED COSTS
Yes

TRANSACTION FEES
Different pricing models per commercial agreement and requirements from corporate customers.



EXECUTIVE TEAM CEO
Luis Maroto

PRESIDENT TRAVEL
Decius Valmborbida

EVP TRAVEL DISTRIBUTION
Angel Gallego

EVP CORPORATIONS
Rudy Daniello

SVP COMMERCIAL, CORPORATIONS
Arlene Coyle

VP CUSTOMER SOLUTIONS, CORPORATIONS
Lydie Charpin



WHAT THE COMPANY SAYS

According to the company, “Cytric is a truly integrated online booking tool and expense management system which offers global unrivalled content, backed by partnerships with travel providers across the industry as part of the Amadeus travel ecosystem.” Cytric executives touted its comparison shopping capability with “all the content in one display, no matter which source” and the ability to apply “programs with superior policy management.” The company also highlighted its risk management tool Amadeus Mobile Messenger.

Regarding innovation in the last 12 months, Cytric has focused on user experience and enhancing its air and rail content. It has also honed its risk and traveler safety partnerships. “Thanks to our partnership with Riskline, we integrated Covid-19-related info, and with AXA Partners we offered insurance and healthcare,” the company noted. Cytric currently is developing its portfolio to cover compliance, smart payment and reconciliation services. With Microsoft, it is working on building new solutions for a smoother and more personalized business travel experience.



WHAT BUYERS SAY

Cytric customers said they chose the tool because of the breadth, sources and appropriateness of content available in the tool. “It is an independent tool, and I don’t have the impression that my TMC limits the content to their own advantage.” Others rated Cytric for the ability to customize. One buyer highlighted the ability to configure pre-trip approvals from the company HR feed. On the negative side, there was confusion among buyers about the availability of NDC content in the tool, which may mean Cytric needs to focus on additional user education. Some buyers were dismissive about Cytric’s user experience.



WHAT CONSULTANTS SAY

Consultants complimented Cytric’s “incredible flexibility on policy and very good configurability,” but the client will need to know how. Cytric does not have TMC resellers and focuses on large market, direct corporate relationships. The tool has improved its user interface, has quality direct-connect capability in spite of its GDS ownership and according to one consultant, “no one can touch Cytric in terms of rail.” It is an open platform that will “plug in anything, if you can get the commercials worked out.” While some consultants see upside in the U.S. for Cytric, it hasn’t yet gained traction in that market. One consultant said it had recently slanted more heavily toward the Amadeus GDS so the partner TMC should have that in place.



CONTENT

Air: All major global distribution systems, plus low-cost carrier and vendor direct connects. VDAs connect to providers’ computer reservation system and all content, including availability and rates, will seamlessly be displayed with no restrictions, just like GDS content. Approximately 100 LCCs are available via a third-party content aggregator, plus VDAs to a number of carriers. The complete content is displayed in a uniform way so that users do not have to adapt to different user interfaces.

Accommodation: In addition to the Amadeus, Sabre and Travelport hospitality content, Cytric’s Vendor Direct Access content offers content from Booking.com, Corporate Rates Club (CRC), ehotel, Hotel.de, HRS, Phoenix DERhotel, Premier Inn and Meetago - MICE. The tool also integrates with leading travel management company proprietary hotel inventories.

Rail: Deutsche Bahn, SNCF, NS International, Evolvi, Trainline, SNCB, SJ, Thalys, Amtrak and Renfe. Rail travel options are comparable alongside air in a fully unified display.

Car: Full GDS car content plus Vendor Direct Access content from Avis, Budget, Enterprise, Europcar, Hertz, National, Sixt. Transfer providers such as Flygtaxi, Groundscope, etc.

NDC & Direct Connect: One of the first providers to receive dual IATA NDC certification as an aggregator and IT provider. Cytric’s mission is to build the largest unbiased price-comparison platform globally offering transparency, flexibility and savings on bookings that TMCs can service. The company says the GDS channel is best positioned to support this vision and is its preferred solution. Short-term, the company is also sourcing NDC from subscriber-pay channels so clients can adopt a hybrid-sourcing approach in the interim.

EGENCIA

KEY STATS PROVIDER
Egencia/Amex GBT

COMPANY TYPE
Travel management company

CORPORATE USERS
9,000

TOTAL USERS/SEATS
Not disclosed

TOTAL ANNUAL BOOKINGS
Over 2 million

TOTAL TRANSACTION VOLUME ANNUALLY
Not disclosed

UPDATE FREQUENCY
10 to 15 new features/enhancements per month on average



PRICING MODEL SET-UP FEES
Yes

ONGOING FIXED COSTS
No

TRANSACTION FEES
Flat fee per booking



EXECUTIVE TEAM

PRESIDENT
Mark Hollyhead

VP PRODUCT & TECHNOLOGY
John Sturino

VP COMMERCIAL
Tristan Smith

VP COMMERCIAL
Tristan Smith

VP CUSTOMER OPERATIONS
Donna Miller



WHAT THE COMPANY SAYS

According to Egencia, “no other TMC has the breadth of data that Egencia has, driven by 2 million users, enabling us to provide customers with an intelligent global platform with relevant, AI-driven experiences.” Egencia calls its platform “extensible,” citing integration capabilities with adjacent services, and providing customers with tools to deliver on travel risk management and sustainability.

The company cited its air vs. rail comparison module as its major innovation in 2021, underscoring its commitment to supporting client sustainability objectives. “As companies start to resume travel, sustainable travel programs are a focus,” the company wrote. “Egencia added several new features to our platform enabling customers to set, track, and meet their sustainability objectives.”



WHAT BUYERS SAY

Respondents in BTN’s buyer survey rated very highly Egencia’s user-friendliness, duty-of-care capabilities and its quality of support and reporting and data analytics. The breadth and appropriateness of content was another key appeal of using the tool as was its reliable uptime.

One buyer highlighted the ease with which users can interact with agents when problems arise, a vote for the tool as a bona fide online corporate travel agency and not as a stand-alone technology.

Some of the disadvantages mentioned by buyers in the survey include commercials and ad pop-ups, lack of expense management and a lack of visibility into product development. One buyer noted, “It is not possible to exclude pre-paid hotel rates and most content data maintenance has to be made by us.”



WHAT CONSULTANTS SAY

Egencia’s booking tool itself is very good, according to consultants, with one noting it had “the best cockpit” for program administrators. Egencia is its own TMC and was the first booking tool, tech-driven product of its kind, and it made a huge impact in the midmarket. TripActions and Travelperk have followed that model. But Egencia has had major purchasing power, being connected to Expedia. That connection, said one consultant, delivers “really special pricing.” All consultants agreed service and support was a weakness. With its recent acquisition by Amex GBT, however, some consultants said clients might eventually get the best of both worlds—eventually.



CONTENT

Air: Multi-channel connections to GDS, aggregators and direct connects. This includes NDC and Egencia Preferred Rates. Air booking is augmented with machine learning optimization enabling travelers and arrangers to book online in under six minutes, according to the company. Egencia enables self-service booking, cancellation, unused ticket redemption and itinerary management, enhanced with Egencia’s travel advisories, health and hygiene information, airline change notifications and travel alerts.

Accommodation: Hotel and lodging is sourced via GDS and Expedia and covers 650,000 properties, including alternative lodging such as apartments and customer negotiated rates. The company displays over 35,000 hotels with exclusive Egencia Preferred Rates. Like air, self-booked lodging capabilities include cancellation and itinerary management, supported by travel advisories, health and hygiene information and travel alerts.

Rail: Egencia operates a multi-channel approach to provide locally relevant content, including Eurostar, in Europe and the U.S., from several rail content providers and direct connects. Users access online booking, cancellation and itinerary management online and in the Egencia app. According to the company, users can self-book rail in under five minutes and features include support for subscription, loyalty and corporate cards, electronic tickets, as well as seat preferences in some countries.

Car: Egencia’s car rental, and ground transportation content, is sourced via the GDS and includes Egencia Preferred Rates offering discounted rates, along with support for customer negotiated rates. Filter results by unlimited mileage and hybrid/electric vehicles. Online cancellation including the app. Egencia also supports contactless pickup for car rental.

NDC & Direct Connect: Egencia offers NDC content for British Airways and Lufthansa Group. Egencia displays NDC and non-NDC content side-by-side as part of air booking. Travel managers can report on key areas such as policy compliance, travel spend and duty of care across all fare types. In the first half of 2022, Egencia will offer access to more NDC content via a GDS partner, starting with Air France and KLM and expanding to other carriers.

KEY STATS

PROVIDER
Deem

COMPANY TYPE
Technology provider

REGIONS SERVED
Global

CORPORATE USERS
Not disclosed

TOTAL USERS/SEATS
Not disclosed

TOTAL ANNUAL BOOKINGS
Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY
Not disclosed

UPDATE FREQUENCY
Every two weeks



PRICING MODEL

SET-UP FEES
Yes

ONGOING FIXED COSTS
Yes

TRANSACTION FEES
Customised per client



EXECUTIVE TEAM

PRESIDENT
David Grace

CPO
Christina Woronchak

SVP, BUSINESS DEVELOPMENT
Todd Kaiser

VP PRODUCT
Harper Lieblich

VP MARKETING
Tahnee Perry



WHAT THE COMPANY SAYS

According to the company, Etta differs from other industry platforms in the comprehensive nature of its content—and particularly its ground transportation content, which other industry tools tap into as an aggregator to deliver the right rides to their own clients. Deem execs also highlighted Etta's SafetyCheck features that provide health and safety information "built into the booking flow to help guide travelers to safer choices." Beyond content and guidance, user experience is a Deem priority with intuitive functionalities, like saving a airline seat while continuing a search, trip sharing with other Etta users and its new ride booking integration with Uber for Business. The company also focuses on extending that experience to users that some platforms don't fully consider. "Etta is designed with accessibility in mind for all users. It addresses vision, hearing loss/deafness, motor and cognitive impairments," according to Deem execs. It also highlighted easy expense integration with a variety of open API expense platforms.

Asked about Etta's most innovative rollout in 2021, the company highlighted Etta's new mobile-first booking and management platform. "The mobile-first design of Etta lets travelers book or modify all segments of their trips on iOS or Android," the company said.



WHAT BUYERS SAY

Deem is a recognized leader in ground transportation content, with one buyer calling "it the most comprehensive and competitive ... from a car or ground perspective." Another buyer said, "Etta has affordable prices and plans and can be easily and quickly integrated with distribution platforms such as GDS or OTA." Users praised the content display and pathways, calling it "intuitive" and noting it "has more features than similar products in the current market." One buyer spoke of numerous requests in play with Deem and said the provider was good about delivering solutions. On the negative side, some users wanted more frequent updates.



WHAT CONSULTANTS SAY

"Deem's go-to-market strategy requires big market clients," said one consultant, but that's not the only client type the company serves. Like buyers, consultants appreciated the user interface. One called Etta "beautiful" and noted some success with bids among their clients base. Etta falls short, according to consultants, with its largely GDS-based content strategy and not enough rail content. "They do a lot for their customers," said one consultant, "but they are not global and just do not exist at certain points of sale."



CONTENT

Air: Etta pulls in content from all major global distribution system players Amadeus, Sabre and Travelport. It direct connects to Southwest Airlines and brings in content from 20 regional and low-cost carriers via Travelfusion, FlightView, Google ITA and ATPCO, including RouteHappy's Universal Ticket Attributes and Universal Produce Attributes.

Accommodation: Users access more than 1 million properties through GDS providers and Booking.com integrations. Clients that use BCD Travel as their travel management company have the option to enable TripSource accommodation content.

Rail: Global rail options are delivered via integrations with Amtrak, Eurostar, SilverRail and VIA Rail. The company said a Trainline integration was coming soon.

Car: Deem serves as a content aggregator in car service for other providers, delivering 5,000 affiliate operators in 85 countries plus National Car & Driver in China. It offers major car rental companies through the GDS, while a direct connect with Enterprise delivers unique content from Enterprise and National car rental companies. Deem has announced the industry's first booking integration with Uber for Business, allowing Etta clients to request on-demand and scheduled rides with Uber's enterprise arm directly in Etta's desktop and mobile versions.

NDC & Direct Connect: Southwest Airlines and Enterprise Holdings Group

KEY STATS

PROVIDER
Sabre

COMPANY TYPE
Technology provider

REGIONS SERVED
Customers in 106 countries and available in 16 languages

CORPORATE USERS
Not disclosed

TOTAL USERS/SEATS
11 million active users

TOTAL ANNUAL BOOKINGS
13 million

TOTAL TRANSACTION VOLUME ANNUALLY
Not disclosed

UPDATE FREQUENCY
Major quarterly releases, with interim service pack releases deployed every three weeks. On average, Neo deploys more than 190 enhancements per year.



PRICING MODEL

SET-UP FEES
Yes

ONGOING FIXED COSTS
Yes

TRANSACTION FEES
Sabre charges a flat fee per GetThere booking. Sabre also will consider offering tiered pricing discounts based on booking volume targets.



EXECUTIVE TEAM

CEO
Sean Menke

CPO
Wade Jones

GENERAL MANAGER
Chris Rosa

HEAD OF ACCOUNT MANAGEMENT
Phil Michie

HEAD OF GLOBAL SALES
Paul Mann



WHAT THE COMPANY SAYS

GetThere touts its global reach, service and experience, along with local support and travel expertise in market. It claims 80 percent traveler adoption among its North American clients and highlights its role in driving savings through rate control and adoption, granular policy control and demand management. According to executives, the platform supports "unlimited customizable rule-based policies" on a super-stable system with average monthly uptime better than 99.9 percent. The tool also offers "flexible integration, [including] API and web services integration with multiple expense tools, HR and ERP systems."

Asked about innovations in the past 12 months, GetThere highlighted a continued focus on user experience, content personalization via NDC and analytics for program administration. In addition to product innovation, execs said, "Sabre strives to innovate around service from account and site management teams, developing creative solutions to meet unique customer requirements."



WHAT BUYERS SAY

Buyer clients praise GetThere's reliability and say their travelers are accustomed to the product, but they would like to see more innovation. In general, they characterized it as an older generation of technology and were generally dismissive of its user interface, which one buyer summed up as, "it still requires training." Yet one buyer said, as old-gen as it may seem, it is able to do "some pretty amazing things" behind the scenes, citing granular policy application down to individual travelers, data manipulation and delivery and ways to audit hotel partner performance. Multiple buyers noted the comprehensiveness of GetThere's content, with the exception of rail. One buyer said GetThere had been cagey about showing actual NDC capabilities against some of the availability it has claimed. Another said, "there is no NDC whatsoever." However, buyers praised the provider's branded fares with a number of carriers.



WHAT CONSULTANTS SAY

"It can be very bespoke and clever," said one consultant about the GetThere tool, which is targeted mostly to large multinational companies. Like buyers, consultants praised its reliability, but all said it had suffered from "lack of investment." Some said Sabre's recent reinvestment in the tool would help and underscored how the tool can do things that others can't—like recognize traveler status—because it has been attached to Sabre from the get-go. But the dated look and feel "doesn't tell a modern story," which may depress traveler acceptance. One consultant also said the tool lacked effective direct-connects required in Europe. Another said lack of truly integrated expense hurt this tool when put up against Concur, which it often is.



CONTENT

Air: All carriers represented in the supported global distribution systems Sabre, Amadeus, Travelport, etc., as well as low-cost, non-GDS content via Travelfusion integration.

Accommodation: In addition to content in the GDS, GetThere Hotel Connect provides access to more than 750,000 non-GDS hotels through aggregator networks including Booking.com, HRS, Premier Inn, Expedia Partner Solutions, and HotelDO. GetThere also can display any preferred non-GDS hotels via GetThere's Preferred Hotel Database, as well as access negotiated properties and rates from CWT's HARP database, the Amex PRDS hotel database, and CMNet hotels in Brazil.

Rail: Direct connects to SNCF and its affiliates (Lyria, Thalys, Eurostar, and TGV) in France via API and SNCB in Belgium, Netherlands, and Luxembourg via API. GetThere also supports Eurostar via GDS and the SNCB network via API. Sabre's Rail Consolidator Platform provides integrated rail content for Amtrak in the U.S. and Trainline in the U.K., and GetThere Rail Connect provides access to VIA Rail content in Canada.

Car: Access to all rental car content in the GDS. In addition, GetThere Ground provides access to thousands of global car service and limo providers, including Carey, Boston Coach, and Empire/CLS, through integration with GroundSpan (over 5,000 global providers) and Deem (over 500 US providers).

NDC & Direct Connect: Travelfusion integration. Single adult passenger, air, branded fares, GDS hotel, GDS ground, corporate policy, shop: search by price, local currencies in Sabre-activated markets, book, pay by credit card, cancel before ticketing, post ticketing cancel/void/refund via Sabre Red 360

LIGHTNING

KEY STATS

PROVIDER

Corporate Travel Manager

COMPANY TYPE

Travel management company

CORPORATE USERS

Not disclosed

TOTAL USERS/SEATS

Not disclosed

TOTAL ANNUAL BOOKINGS

Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY

Not disclosed

UPDATE FREQUENCY

Every two week, minimum



PRICING MODEL

SET-UP FEES

Not disclosed

ONGOING FIXED COSTS

Not disclosed

TRANSACTION FEES

A range of options: flat fees per booking; graduated fee that varies according to transaction volume; graduated fee that varies according to the total value of transactions in a given period; percentage of the value of the transaction; bundled subscription basis.



EXECUTIVE TEAM

GLOBAL MANAGING DIRECTOR,

Jamie Pherous

GLOBAL CFO

Laura Ruffles

EMEA CEO

Debbie Carling

N. AMERICA CEO

Kevin O'Malley

GENERAL MANAGER, SALES

Shelley Matthews



WHAT THE COMPANY SAYS

CTM points to agile regional development philosophy that pushes innovations from four technology hubs in the U.S., U.K. Australia and Hong Kong as benefitting customers. The company claims to address local market requirements in its booking tool faster than any other travel management company, supported by proven technology "deeply ingrained" in an end-to-end travel tech stack.

Regarding specific innovations, the company highlighted how it has expanded Lightning to incorporate a full travel workflow alongside proprietary tools including CTM Risk Alerts, CTM Data Hub and CTM Climate+. The company promoted "a more fluid, cohesive operating system for global business travel that standalone booking tools cannot match.

The company also pointed to Lightning's sustainable travel features: enabling users to set, monitor and redeem carbon budgets at company, division, team and individual levels and offering a "real-time carbon budget health bar [that] shows carbon cost of each travel option, with the greenest choices highlighted in searches." The company also said it was working with clients to build carbon costs into approval systems and share carbon budgets between travelers.



WHAT BUYERS SAY

One corporate travel manager whose company began working with CTM and the Lightning platform in 2018 said it made the move partly due to the "full hotel content provided," adding its previous partner had an "ageing online booking platform" and "very restricted" hotel offerings in comparison. Another buyer commented on Lightning's "ease of use, content and the continuous development cycle," adding the support team has been helpful when encountering challenges. One buyer in the early stages of its relationship with CTM said the booking platform was "true to its name" in terms of speed and provided "intuitive features" that contribute to a good user experience.



WHAT CONSULTANTS SAY

Consultants said they had active bids that included CTM's Lightning booking tool, but that the tool works best from Australia, New Zealand, U.K. and U.S. points of sale. "It doesn't have proof of life for a global customer," said one. Another noted the TMC itself rolls out four tools globally. That said, for the right regions, Lightning was characterized as a "well-received tool," with a good user experience.



CONTENT

Air: Global distribution system, low-cost carrier and New Distribution Capability deliver content from more than 400 airlines globally and is filtered by company policy. CTM offers negotiated fares up to 45 percent off published rates. Client-specific rates and routes are available through Sabre. CTM integrated RouteHappy content with the tool in 2020 to deliver granular service information.

Accommodation: Sabre GDS provides more than 32,000 hotels available as standard along with associated client-negotiated rates. CTM Hotel Program offers discounted rates with a million properties in 149 countries and more than 6,000 cities, plus a comprehensive range of preferred rates. CTM has integrated Conferma for extra content and payment options. It also offers online travel agency content through Expedia Partner Solutions with Booking.com content from more than 60,000 properties in more than 25,000 markets worldwide. Lightning has direct APIs with, eg, Premier Inn/Travelodge.

Rail: Rail content is provided through a variety of sources regionally. In the U.K., domestic rail content is provided by Evolvi. European content is provided by International Rail. R&M has recently introduced comparison capabilities on flights versus domestic and European rail carbon costs.

Car: Preferred partnership agreements with global car rental providers including Sixt, Avis, Enterprise, Hertz and Europcar among others.

NDC & Direct Connect: CTM is Level 4 certified for IATA's NDC program and is live in Lightning with NDC content from a range of carriers, including Singapore Airlines, Qantas, British Airways and Lufthansa. The tool is in NDC development stages with American Airlines and United Airlines and is working with multiple major carriers as they develop their NDC strategies. CTM sits on IATA's global travel management executive council advising on future strategic direction and adoption of NDC across the travel supply chain.

NEO

KEY STATS

PROVIDER

KDS/AmexGBT

COMPANY TYPE

Travel management company

CORPORATE USERS

Not disclosed

TOTAL USERS/SEATS

Not disclosed

TOTAL ANNUAL BOOKINGS

Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY

Not disclosed

UPDATE FREQUENCY

Major quarterly releases, with interim service pack releases deployed every three weeks. On average, Neo deploys more than 190 enhancements per year.



PRICING MODEL

SET-UP FEES

No

ONGOING FIXED COSTS

No

TRANSACTION FEES

Depends on deal structure



EXECUTIVE TEAM

CEO

Paul Abbott

CCO

Andrew Crawley

EVP PRODUCT STRATEGY

Evan Konwiser

VP PRODUCT MANAGEMENT NEO

Bertrand Blais

VP E-COMMERCE TECHNOLOGY & PRODUCT

Andrew Wardle



WHAT THE COMPANY SAYS

According to company executives, "Neo is a truly unified booking and expense platform, for a faster, more efficient way to manage trips, end-to-end." Since 2013, the OBT has been known for its unique door-to-door trip builder and algorithms for proactive suggestions based on booking history, which have undergone many enhancements since they were introduced. Neo is an integral part of GBT's core technology stack, and the provider promoted Neo's seamless, multi-channel booking experience between mobile, desktop and travel counselors. It also provides a flexible environment for travel managers to apply best-in-class travel policies.

"As the world returns to travel, it is with a renewed commitment to protect the climate," Neo execs told BTN in response to a survey question about the tool's best innovation going into 2022. They called out Neo's "suite of award-winning sustainability features," which include display of and filtering by CO2 data for flights and trains, client-specific green hotel badges and flagging and filtering for hybrid/electric cars. "GBT plans to continue prioritizing sustainability developments for Neo in 2022," they said.



WHAT BUYERS SAY

Buyers cited cost as among the main reasons they chose to implement Neo, but two-thirds of buyers BTN surveyed said user-friendliness was a key deciding factor in choosing it. Some said that the tool's Covid and carbon reporting functions were particularly impressive, while one buyer liked the ability to select seats on British Airways flights. Neo's door-to-door planning tools were liked by some but considered "not user-friendly" by others. A number of buyers felt that Neo lagged with NDC content and were concerned that it could lead to higher air fares.



WHAT CONSULTANTS SAY

"We did a ton of due diligence on the KDS booking and expense platform and we could not replicate what they are able to do in Europe markets. As a result, KDS has functionality highly valued in Europe," one consultant told BTN. That hasn't been the case in the U.S., where the tool has struggled to gain traction, according to consultants. There's a misperception that one must be an Amex GBT client to work with the KDS tool, since the mega-TMC bought KDS in 2016. Technically, that is not the case. KDS will offer direct corporate contracts, but practically speaking, "a different TMC will then give you 100 reasons not to work with them," according to one consultant. Neo 1, the recently launched version of the tool targeted to small- and midsize clients, could give the brand a shot in the arm in the U.S. said one consultant.



CONTENT

Air: Neo connects with Sabre, Amadeus and Travelport global distribution system partners as well as Travelfusion for low-cost carrier aggregation, plus a direct link for Air Canada. Online modification, cancellation and exchange are available for Sabre and Amadeus, with expansion of this capability for Travelport in development. In some countries, Neo can remind users of unused airline credit and display the credit value during the booking process.

Accommodation: Neo sources accommodations content from GDS partners, Expedia, and Booking.com. GBT's Supply Market Place consolidates this content for booking through Neo and offers users a complete range of accommodations including GBT Preferred Extras rates.

Rail: Neo EU train content covers Germany (DB), France (SNCF), Belgium (SNCFB), Spain (Renfe), Finland, U.K. (Trainline), Sweden, Holland (NS), and Luxembourg (CFL). Users can also book tickets on Eurostar and Thalys. Neo plans to develop cross-border booking capabilities. In North America, Neo offers Amtrak and ViaRail. Neo users can now book specific train seats with SNCF and soon with Renfe

Car: Neo supports booking car services, taxi and other ground transportation options as part of its booking process. Car rental content is obtained through supported GDS partners and the Res@Car direct link. Neo provides access to hybrid and/or electric vehicles where available with specific ability to filter and sort on these types to ensure access to lower-carbon vehicles.

NDC & Direct Connect: Neo was the first OBT to receive GDS-enabled, surcharge-free NDC content from American Airlines and the Lufthansa Group (including Light Fares) in Germany for integrated client servicing, reporting and support. GBT technology and point-of-sale capabilities provide efficient platforms for large scale distribution of GDS-enabled NDC content and seamless integration with GBT client servicing tools. In 2022, GBT plans to accelerate NDC content deployment from more airlines across multiple countries.

KEY STATS

PROVIDER
TravelPerk

CORPORATE USERS
Thousands of customers worldwide, from SMEs to large businesses, across all sectors and on every continent.

TOTAL USERS/SEATS
Not disclosed

TOTAL ANNUAL BOOKINGS
Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY
Not disclosed

UPDATE FREQUENCY
Constant

COMPANY TYPE
Online travel management platform



PRICING MODEL
SET-UP FEES
No

ONGOING FIXED COSTS
No

TRANSACTION FEES
Flat fee per booking



EXECUTIVE TEAM
CEO
Avi Meir

CCO
JC Taunay-Bucalo

CFO
Huw Slater

CHIEF PRODUCT & TECHNOLOGY OFFICER
Ross McNairn

CHIEF OF STAFF N. AMERICA
Michael Rozisky

VP SALES EMEA
Olivier Nairey



WHAT THE COMPANY SAYS

TravelPerk markets its product as “the world’s leading business travel management platform.” The company prides itself on offering expansive multi-sourced content “across air, rail, car rental and accommodation.” It promotes “seven-star customer service” that is human-driven, “so you can get help from a real person—not a bot—when it counts.” The company highlights its FlexiPerk product, which allows customers to cancel bookings up to just two hours before departure and still receive a refund of the majority of the trip cost. It offers a carbon offsetting program GreenPerk, and recently launched an events management platform TravelPerk Events.

Regarding the company’s most important innovation in 2021, TravelPerk execs pointed to TravelPerk Events. “The last two years have shown that the meetings that matter, happen in person,” they said. “We created Events to meet this need in a hybrid working era, by providing a platform through which businesses can organize and manage company events including sales kick-off, offsites and seasonal company parties. “



WHAT BUYERS SAY

One buyer said the best feature of TravelPerk was “the ability to cancel any trip and get a refund of 80 percent on my canceled journey,” while another liked the vast range of accommodation available through the tool. The tool scored high marks from buyers on air, accommodation and rail content, and buyers were mostly satisfied with account management and support. On the negative side, one U.S.-based buyer said the tool and customer support was not as efficient in North America and other markets as it is in Europe. In Europe, one buyer said the tool suffered from slow integration with rail provider content. Another said that an online tool could “never replace the human touch.”



WHAT CONSULTANTS SAY

One consultant called this tool “an SME pure play” but also underscored how important TravelPerk has been as an option in that market segment, which is demanding straightforward tools, access to discounts and a net beneath their business travelers in terms of disruption support or other complications. Regarding the guaranteed refund strategy, one consultant said, TravelPerk was “choosing to charge a little more on the fee and take a hit if they have to refund.” Consultants complimented the user experience in the technology itself, and praised the TravelPerk for good coverage in Europe, but could not say whether the tool had adequate stress tests in the U.S. market. None had TravelPerk involved in bids, but that was likely a function of the typical market segment this tool serves.



CONTENT

Air: TravelPerk offers GDS content via Amadeus; it does not direct connect to any airlines, but it does get NDC and low-cost carrier content via two aggregator partners. TravelPerk is provider agnostic and its goal is to bring more content and more value to the market with this approach.

Accommodation: Hotel and accommodations content comes from the Amadeus GDS as well as a Expedia, Booking.com and a number of bed banks.

Rail: Multiple aggregators in Europe; Amtrak in the U.S. With the acquisition of Click Travel, TravelPerk is exploring new options.

Car: Large selection of corporate car rental providers including Sixt, Hertz, Avis, EuropeCar. All content through the Amadeus GDS.

NDC & Direct Connect: Partnered with Lufthansa Group Airlines.

KEY STATS

PROVIDER
TripActions

COMPANY TYPE
Online travel management platform

CORPORATE USERS
5,000

TOTAL USERS/SEATS
Not disclosed

TOTAL ANNUAL BOOKINGS
Not disclosed

TOTAL TRANSACTION VOLUME ANNUALLY
Not disclosed

UPDATE FREQUENCY
Daily



PRICING MODEL
SET-UP FEES
Yes

ONGOING FIXED COSTS
No

TRANSACTION FEES
No



EXECUTIVE TEAM
CEO
Ariel Cohen

CTO
Ilan Twig

CPO
Nina Herold

EVP TECHNOLOGY, PRODUCTS & INNOVATION
Russ Howell

CMO
Meagen Eisenberg

CRO
Carlos Delatorre



WHAT THE COMPANY SAYS

“TripActions handles booking, inventory and payment [and] expense in an all-in-one platform,” according to company executives. TripActions rolled out its payment and expense platform Liquid in 2020 and expanded that functionality to Europe in 2021 via a partnership with Stripe to issue U.S. dollar-, British pound-, and euro-denominated smart virtual cards and physical cards in the region. It also partnered strategically with Lufthansa last year to target the small- and midsize clients enrolled in the carrier’s SME corporate discount programs with a version of the TripActions booking platform.

Asked about the company’s most important innovation in 2021, executives identified Covid information and documentation functionalities: “TripActions integrated health passport and Covid-19 change notifications, allowing travelers to upload and manage documentation and stay informed of destination-specific restriction changes, directly in the app.”



WHAT BUYERS SAY

Buyers praised TripActions’ content-agnostic approach and the ability to work with a single instance of the booking tools and content across all the markets in these buyers’ programs (these buyers were Western Europe heavy). They also noted TripActions’ swift implementations and that travelers enjoy the user experience. More than one buyer specifically commented on the willingness of TripActions to “work with the needs of the business,” as one put it, and another said they had negotiated in their contract for 90-day turn around on additional feature requirements. Rapid technology rollouts were valued by buyers, but several noted that new features can be “buggy” when they are introduced, with the company biased toward speed to market. Buyers commented on the system’s easy access to travel and expense management data for program administration. They also praised the recently introduced Covid-19 health information and notifications.



WHAT CONSULTANTS SAY

“The tool itself is very impressive,” one consultant told BTN. Another said it was “leaps and bounds ahead of others” in terms of mobile capabilities and chat functions. But one consultant criticized TripActions’ hype as “mostly based on sales pitch rather than people living with the tool.” Consultants speculated that TripActions’ Reed & Mackay acquisition was at least partially a strategy to get true travel and service expertise into the company. While TripActions has claimed it can serve large multinational companies, consultants told BTN the tech/TMC is missing some basic requirements for those clients—specifically, that customer service and reporting quality were weak. TripActions’ sweet spot remains in the small- to midmarket. That said, two consultants said, with time, TripActions would figure it out.



CONTENT

Air: TripActions partners with Sabre and Amadeus for global distribution system content and works through Travelfusion for low-cost carriers. It offers a direct connection to Southwest Airlines. TripActions partners with multiple North American and European carriers for New Distribution Capability content.

Accommodation: Accommodation content for 1.2 million properties given through multiple sources including direct connect and partner ABC Consortia. Source through both Priceline Partner Network and Expedia Partner Solutions to offer a robust content solution for clients.

Rail: Eurostar, DB, SNCF Thalys, U.K. Rail and Amtrak inventory with pipeline on Renfe, Italo, SNCB, NS International, SJ and SBB.

Car: TripActions sources car rental content from GDSs and Priceline. Inventory comes from over 35 agencies around the world and includes specially discounted pricing. TripActions also connects with over 5,000 black car services and integrates itineraries with Lyft, Uber and Grab.

NDC & Direct Connect: NDC with United, and Lufthansa group with other carriers in the pipeline. Direct connection with Southwest Airlines for self-service, early check-in and unused ticket use.

KEY STATS

PROVIDER
Serko

COMPANY TYPE
Online travel management platform

CORPORATE USERS
7,000+ corporates / 300,000+ SMEs

TOTAL USERS/SEATS
3 million+

TOTAL ANNUAL BOOKINGS
5 million in 2019

TOTAL TRANSACTION VOLUME ANNUALLY
\$3.35 billion (2019)

UPDATE FREQUENCY
Continuously updated by a team of 300+ technology professionals. Zeno Labs is a programme that connects corporate travel buyers into Serko's product teams to ensure the innovation roadmap is aligned to their needs.



PRICING MODEL SET-UP FEES
No

ONGOING FIXED COSTS
No

TRANSACTION FEES
Flat fee per booking



EXECUTIVE TEAM

CEO
Darrin Grafton

COO
Charlie Nowaczek

CTO
Duanne O'Brien

CMO
Nick Whitehead

SVP NORTH AMERICA
Tony D'Astolfo

VP SALES NORTH AMERICA
Mike Daly



WHAT THE COMPANY SAYS

According to the company, "Zeno is the intelligent travel management platform built around the priorities of the new world of travel, empowering corporate travel buyers to come back safer, leaner and smarter than before." Executives highlight the tool's intuitive experience built on an open content platform and Zeno's personalization capabilities toward travelers but still based on corporate policy, and supporting a connected itinerary for enhanced duty of care, spend and risk management.

Regarding innovation, the company said it adapted during Covid, "by displaying destination risk and travel requirement information as well as airline and hotel Covid precautions in the booking flow." As a result, they said, Zeno helped instil confidence in travelers and business leaders to return to travel. In addition, "Integrated carbon impact and offset capability has helped corporates take the first steps towards more sustainable travel programs."



WHAT BUYERS SAY

Buyers told BTN they chose Zeno for the intuitive user interface, but also because the tool has allowed them to drive innovations through their programs—for the user but also for back-end content initiatives that have resulted in more traveler booking freedoms against policy as well as savings. A drawback has been the more regional nature of the tool, which is strongest in Australia, New Zealand and the United States.



WHAT CONSULTANTS SAY

Consultants said they had active bids that included Serko and one liked to include Serko to show innovation potential to clients, even if Serko did not have full market coverage, as buyers also noted. "They are open to content," said this consultant, "and they have people who really understand." Certain TMC relationships are helping Serko get attention right now. One consultant pointed out "they are missing rail," working only with an aggregator to "pass a sniff test." One consultant said they were waiting for the tool to mature in more markets because they thought Serko "could be a player" for large global accounts.



CONTENT

Air: Zeno's sourcing engine integrates air content from the GDS, aggregators such as Travefusion and direct NDC connections. Zeno brings together information on in-flight amenities and on-time arrival data to carbon impact and destination arrival requirements. Outbound and return fares can be mixed from multiple sources for everything from domestic to complex multi-stop international.

Accommodation: More than 6 million accommodation options, sourced from the GDS as well as aggregators such as Booking.com, Expedia and HRS. In addition to hotel content, Zeno offers a full suite of alternatives including short-stay lets and serviced apartments. Users can filter results, read guest reviews and find the accommodation's proximity to their office or client. Properties with enhanced COVID protection measures are highlighted for quick reference.

Rail: Increasing selection of rail content across North America and Europe. Rail and air options can be compared during the search to find the most time efficient or cost-effective itinerary and combined into a single booking.

Car: Rental car options from all major providers are available in Zeno, with intelligent alerts during the booking process to prompt travelers if their arrival falls outside of location opening hours. To drive more sustainable travel programs, hybrid or electric vehicles can be preferred based on corporate policy.

NDC & Direct Connect: Direct NDC and API connections that personalize fares and inclusions to the traveler, and ensures regional coverage through direct connections to smaller airlines not available through the GDS.

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- SEATTLE September
- TORONTO October
- DALLAS November
- NEW YORK November
- SAN FRANCISCO December

STRATEGIC MEETINGS SUMMIT

- CHICAGO May
- SAN FRANCISCO June
- NEW YORK June
- LONDON May

BUSINESS TRAVEL TECH TALK

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- CHICAGO June
- LONDON October

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NEW YORK October 24

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NEW YORK December 7

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10th ANNUAL BUSINESS TRAVEL ACCOMMODATION SUMMIT EUROPE

LONDON October

entertainment TRAVEL SUMMIT

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- LONDON September
- LOS ANGELES November 17

GOVERNMENT TRAVEL SUMMIT

WASHINGTON DC September

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NEW YORK December 5

sustainable BUSINESS TRAVEL SUMMIT

- NEW YORK April
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