



INTO THE UNKNOWN

**WHAT LIES AHEAD FOR
BUSINESS TRAVEL IN 2021?**

THE 2021 OUTLOOK

Industry leaders attempt to predict the (almost) unpredictable

LOSING CONTACT

Touchless travel gains momentum in new business travel environment

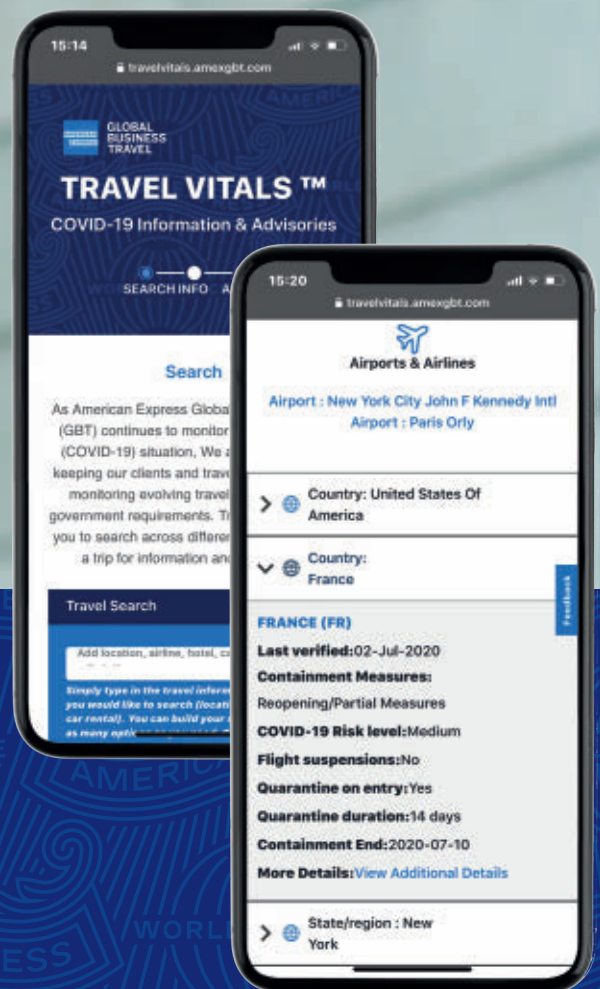
THE CUSP OF CHANGE

TMCs get to grips with new pricing models and industry consolidation

Confidence is vital to get the world moving again

Travel Vitals™ brings
together the latest
information your travellers
need for every step of the
journey – **all in one place.**

**DON'T BOOK A
TRIP WITHOUT IT**



Find out more at travelvitals.amexgbt.com
#WithTravel



**GLOBAL
BUSINESS
TRAVEL**

DON'T *do business* WITHOUT IT™

American Express Global Business Travel (GBT) is a joint venture that is not wholly owned by American Express Company or any of its subsidiaries (American Express).
"American Express Global Business Travel," "American Express," and the American Express logo are trademarks of American Express and are used under limited license.

Recovery position

New national lockdowns are a setback for buyers and suppliers as business travel's recovery continues to be pushed back



BY ANDY HOSKINS
EDITOR-IN-CHIEF, BTN EUROPE

Business travel's fledgling recovery has been dealt a further blow this winter with the implementation of new national lockdowns across several European nations including France, Germany and England.

Already battling constantly changing quarantine requirements, and with limited and inconsistent airport testing regimes in place, it is yet another – if not entirely unexpected – setback for this struggling industry. A second wave of Covid-19 was always a possibility, unfortunately.

Quite what impact the latest national lockdowns will have remains to be seen, but it seems residents of England will still be permitted to travel overseas for work, it not leisure, under the new restrictions. Airlines, however, will undoubtedly be cutting their schedules once again. “It’s good that business travel will be allowed but it’s fairly meaningless while quarantines remain in place rather than pre-departure airport testing,” one TMC told *BTN Europe*.

Hopes that autumn would deliver a notable return in business travel activity were largely unfounded, although many TMCs have at least reported 20 to 30 per cent of ‘normal’ booking volumes in recent months. More

extensive recovery continues to be pushed back and the majority of buyers and suppliers now expect international travel to meaningfully resume in the next six months. Making any predictions about the fortunes of the business travel industry in the year ahead is challenging, but you’ll find the

“

It’s good that business travel will be allowed but it’s fairly meaningless while quarantines remain in place rather than testing

hopes and expectations of a range of industry leaders charted in our 2021 Outlook on pages 18-23 of this issue. Here, and throughout the magazine, you’ll also find some of the results of BTN’s recent State of the Managed Travel Industry survey – thank you to all those who took the time to contribute.



As the industry resets and considers the path forward, we report on the evolving TMC market – consolidation, client movement and new pricing models – on pages 31-34; the rise of touchless technology in travel (p26-29); how to go

about contracting airlines in the current circumstances (p36-38); and the increasing significance of duty of care procedures (p44-47).

Lastly, there’s the small matter of Brexit. A subject that once looked impossible to displace, it’s now back on the agenda. Having left the EU in January, the UK’s transition period comes to an end on December 31 and there are still question marks about its impact on travel (p40-42).

So far this autumn we’ve held one-day virtual events for European travel managers covering the risk, accommodation and meetings sectors, with Business Travel Tech Talk bringing the series to a close on 24 November. We’re also delighted to announce Business Travel Show Europe Kick Off, a one-day virtual event taking place in February as a precursor to the live Business Travel Show Europe in June. We hope you’ll join us there.

CONTENTS

Want the news delivered to your inbox?
Sign-up to regular *BTN Europe* e-newsletters
businesstravelnewseurope.com/newsletter



p26

Regulars

IN FOCUS

4SIGHT	7
Loud & Clear	14

INFORM

Transport news	8-9
Industry news	10
Accommodation news	12
Technology news	13

INTEL

Databank	16-17
----------------	-------

OPINION

According to Amon	24
by Amon Cohen	
Brussels Bulletin	48
by Jennifer Baker	

Features

18-23 The 2021 Outlook:

Predicting the (almost) unpredictable

After a year like no other, *BTN Europe* canvasses a range of business travel industry leaders to see what they think – and hope – 2021 has in store

26-29 Touchless travel: Losing contact

The concept of 'touchless travel' is accelerating in a new environment where preventing the spread of Covid-19 is paramount

31-34 TMCs: On the cusp of change

New pricing models, client movement and industry consolidation – there's never a dull moment in the TMC business

36-38 Air sourcing: Up in the air

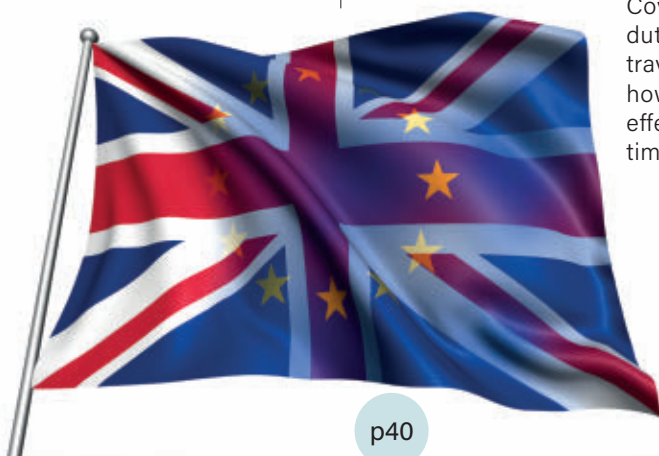
With no meaningful 2020 data and huge questions marks over the recovery of business travel, how can travel managers get airline deals in place for 2021?

40-42 Brexit: Transition time

Covid-19 might have overshadowed the UK's first months following its departure from the EU, but the end of the transition period is now drawing near

44-47 Duty of care: Another level

Covid-19 has catapulted duty of care to the top of travel buyers' priority list, but how can you manage it effectively in such uncertain times?



p40

Editorial Director Elizabeth West
Editor-In-Chief Andy Hoskins
Acting Digital Editor Mark Frary
Contributors Donna Airolti,
Jennifer Baker, Michael Baker,
Amon Cohen, Rob Gill, Dawit
Habtemariam and Adam Perrotta

Art Director James Jarnot
Designers Claire Gates, Steve Ward

Publisher Chris Mihalop
Group Publisher Louis Magliaro
Managing Director UK David Chapple

Head of Events Emma Gordon
Marketing Director Rochelle Jayawardena
Advertising Production Amanda Ludman

Website businesstravelnewseurope.com
Front cover image: Getty

BTN Europe is published by
Northstar Travel Group, Spaces,
The Epworth, 25 City Road,
Shoreditch, London EC1Y 1AA



Copyright © 2020 Northstar Travel
Group and/or its subsidiaries
and licensors. Corporate offices:
100 Lighting Way Secaucus, NJ, US.
All rights reserved.

The magazine is entirely independent
of all commercial interests within the
travel industry. Unsolicited manuscripts
will not be accepted for publication. The
opinions expressed by contributors are
not necessarily those of the publishers
who cannot accept responsibility
for any errors or omissions.

ISSN 2634-3053





Here, as always

Feel reassured when you travel with our new Premier Inn CleanProtect promise, as well as getting the same comfy bed and tasty breakfast you've come to expect across all 800 of our hotels.

Contact our Business Sales team
to find out more on 01582 314620



Premier Inn



For a safer journey

Your wellbeing is our priority

We've put new measures in place for your safety. Please follow the guidance on our website. We look forward to welcoming you back soon.

4 SIGHT

DIGITAL INNOVATOR

Johnny Thorsen

VP strategy and innovation,
American Express Digital Labs



Booking tools today are not really doing a great job of bringing this information to the forefront. If you want to drive change you need to move emissions information right up front so the minute you look at availability for flights or hotels you also see what's left of your company's carbon budget, if it has one. It's also important to ask your TMC or booking tool provider for the logic behind

their emissions calculations – a lot of them are using old formulas. Reducing your environmental impact comes first, then it's about offsetting. We're in the early stages of an unstandardised environment with so many different ways of doing things, so how do you plan that into a corporate framework? I would also like to see a total emissions report as part of my expense report after every trip.

TMC

Shelley Matthews

General manager sales,
EMEA, CTM



A move towards more sustainable corporate travel has been on the agenda for the last decade but living through the pandemic has accelerated our corporate clients' desire, ability and urgency to adopt a more environmentally focused travel policy. We believe it's our role as a TMC to help our clients better understand the environmental impact of their travel and support them to achieve their carbon neutrality

goals. One way in which TMCs can do this is by providing relevant information in their booking tools at the point of search. In our own tool, Lightning, for example, air and rail options appear alongside each where both are available, and information about carbon emissions is as clear as the price. TMC tools, such as CTM's Smart Data, also enable users to monitor their emissions – by month, trip, traveller etc – and to offset them.

There's been much talk of the potential to entrench sustainable travel policies into travel programmes while volumes remain low, but do online booking tools display sufficient quality information at the point of search to help travellers make 'greener' decisions?

TRAVEL CONSORTIUM

Julia Lo Bue-Said

CEO, The Advantage
Travel Partnership



We're anticipating increased demand for easily accessible CSR technology solutions that our TMC members can offer their corporate clients. Members already have a choice of many online booking tools and we accept that different booking tools come with different levels of detail around emissions and sustainable options. Regardless of which OBTs are being used, it's really down to smarter delivery of

the sustainability policies, and the TMC is perfectly placed to work with clients to support this. Not only in terms of OBT configuration and preferencing of travel options, but through use of additional tools such as CO2 reporting, where the TMC can provide analysis and recommendations. We passionately support and encourage greener choices and we recently introduced a partnership with Thrust Carbon.

TECH SPECIALIST

David Chappell,

Country Director UK,
Midoco



Sustainability as a driving factor in corporate responsibility, alongside other factors – such as risk – has accelerated far quicker than the market has been capable of reacting to. It's not simply a case of online booking tools making space within their functionality to add a new filter, to prioritise sustainable options throughout the booking process – the entire supply chain has to feed content into these platforms

to provide this information. And therein lies the problem – significant change requires investment and market demand to justify the time and expense, and then there is the problem of how you monitor success. What's needed is a more holistic approach by all parties, not just booking tool providers, to ensure travellers can make sustainable, measurable decisions, not just a green finger in the air.



BY MICHAEL BAKER

TRANSPORT NEWS

It might be slow progress, but airport testing for Covid-19 should provide a bypass to quarantine

As rapid Covid-19 testing becomes more readily available, airlines are counting on it as a way around quarantine restrictions before a vaccine is widely available and distributed.

However, Emirates president Tim Clark threw a dash of cold water on that idea at a recent CAPA Centre for Aviation virtual conference. The carrier began to put testing in place early in the pandemic, which Clark said “was a bit of a shot in the dark, but we believed at the time it was a meaningful way forward.” Since then, though, “we were unable to persuade the UK government or Europeans that this was a smart way of going about it.”

Major European airports have been establishing testing facilities for months – with Heathrow among the latest – but the bigger step will be turning those into a path round quarantine restrictions.

Elsewhere, Canada, which has some of the heaviest restrictions in place, has been conducting a Covid-19 testing programme for passengers arriving in Toronto since September to see whether testing could be an alternative to quarantine, and Air Canada said the early results are encouraging.

Data from these trials, if successful, will fuel airlines and other travel industry leaders working to establish “airbridges” between high-traffic destinations, including London-New York and Hong Kong-Singapore.

Another big step was a reportedly successful test of the CommonPass digital health passport on a flight from London to New York in October. With CommonPass, passengers who get a negative test receive a QR code that acts as a digital health pass, which provides a common platform across different jurisdictions and languages while also providing data privacy for passengers. Commons Project CEO Paul Meyer is promising “broad-scale deployment” by the beginning of 2021.



Heathrow is ‘no longer Europe’s biggest airport’

Paris Charles de Gaulle has overtaken London Heathrow to become Europe’s largest airport for the first time, Heathrow’s CEO has said while announcing the airport’s third quarter results.

John Holland-Kaye said that part of the reason was Heathrow’s continental rivals have implemented testing regimes. “Britain is falling behind because we’ve been too slow to embrace passenger testing. European leaders acted quicker and now their economies are reaping the benefits,” he said.

“Bringing in pre-departure Covid tests and partnering with our US allies to open a pilot airbridge to America will kickstart our economic recovery.”

Qantas’ UK return dependent on vaccine

The CEO of Qantas has said that restarting international flights to the UK and US is “going to need a vaccine given the high prevalence of the virus in both of those locations”. Alan Joyce’s comments were made at the airline’s AGM in October, ABC News reported. “We are getting more and more confident about the opportunities and the potential for a vaccine in helping getting those operations up by potentially the end of 2021,” said Joyce.

IAG group cuts winter capacity

International Airlines Group (IAG) – parent company of British Airways, Iberia, Aer Lingus and Vueling – will cut winter capacity to no more than 30 per cent of what it was in 2019 in a bid to stem losses. The company said that passenger capacity in the third quarter declined by 78.6 per cent and passenger traffic declined by 88 per cent. Seat load factor in the quarter was just 48.9 per cent.

Regional airports facing insolvency by year’s end, says ACI

Nearly 200 airports – mainly regional ones – face insolvency in the coming months and government financial support will be required to “avert geographic equality and damaged social cohesion”, the organisation which represents Europe’s airports has said.

ACI Europe says there was a year-on-year decrease of 73 per cent in passenger traffic at Europe’s airports in September and that the total number of ‘lost’ passengers since January has now reached 1.29 billion. It believes 193 airports face insolvency in the coming months if passenger traffic does not start to recover by the year’s end.

“

The demand for air travel is there, but restrictive quarantine measures are holding businesses back

Air travel deemed crucial to success by large companies

The majority of UK business leaders would return to the skies if quarantine measures were eased, according to a survey commissioned by London City Airport. The research also showed nine out of ten leaders of businesses with more than 250 employees believe air travel is important to the future success of their business and nearly half thought that the UK government’s travel and quarantine restrictions were the single biggest barrier to air travel for business.

Blacklane adds flat-fare rides from London

Chauffeur drive company Blacklane has introduced flat fares on services between London and six UK cities in a bid to compete with rail travel. The rates – per ride, rather than per passenger – are available at any time of day between London and Birmingham (£99), Bristol (£99), Cambridge (£50), Liverpool (£199), Manchester (£199) and Southampton (£70), with more destinations due to be added.

France steps up airport Covid testing

France is now offering rapid Covid tests at its airports for passengers heading to the United States and Italy and for passengers arriving in France from countries in the red zone, as designated by the new traffic light system being rolled out by the European Union. France's health minister Jean-Baptiste Djebbari said the antigen tests would be in place at airports by the end of October.

EasyJet heading for first annual loss

EasyJet expects to make a pre-tax loss of between £815 million and £845 million for the 2020 financial year in what would be the first loss in its 25-year history.

The carrier said it is “well positioned for the recovery”, but in the year to 30 September had carried half the number of passengers – some 48 million – than it did the previous year. It matched this with 48 per cent capacity cuts and has also closed bases and made large numbers of staff redundant.

IATA: airlines fast running out of cash

Airlines cannot cut costs sharply enough in the current pandemic in order to avoid bankruptcies and job losses, and have just a few months of cash left, said IATA's chief executive recently.

The organisation said it expected 2020 revenues from the airline sector to be 46 per cent down on 2019 figures of US\$838 billion. “The fourth quarter of 2020 will be extremely difficult and there is little indication the first half of 2021 will be significantly better, so long as borders remain closed and/or arrival quarantines remain in place,” said Alexandre de Juniac, IATA's director general and CEO.

“Without additional government financial relief, the median airline has just 8.5 months of cash remaining at current burn rates. And we can't cut costs fast enough to catch up with shrunken revenues.”



Pandemic set to bring rising fares

The additional regulations and complexity surrounding air travel in a Covid world and accelerated consolidation among airlines will mean airfares are certain to rise.

Thomas Reynaert, managing director of Airlines for Europe (A4E), made the prediction at a recent GBTA event, saying, “Flying is not going to get cheaper with additional regulations and it will not be easier, including for business travellers.”

Reynaert also said the pandemic is accelerating industry consolidation. “We have seen consolidation already happening in the last couple of years. What this crisis will do is trigger it faster than expected. Airlines are in a really tight cash situation and there are issues over liquidity. As long as travel restrictions do not improve and we don't get a vaccine for everyone – and not just the minority – then I think consolidation will clearly happen,” he said.



VIRGIN ADDS MANCHESTER-INDIA ROUTES

Virgin Atlantic is to launch services from Manchester to Delhi and Mumbai.

Three-times weekly services to Mumbai will begin on 19 December and twice-weekly services to Delhi using Boeing

787-9 aircraft on 5 January.

The airline already operates daily flights to the two Indian cities from Heathrow. Virgin will also launch flights from Manchester to Islamabad in Pakistan this December.

Eurostar rolls out SME loyalty programme

Cross-channel rail operator Eurostar has launched Eurostar For Business, its first loyalty programme for small and medium-sized companies. For every 15 return trips booked in Standard class through the new portal, members earn an upgrade to Standard Premier; for every 15 trips booked in Standard Premier an upgrade to Business Premier is awarded; and companies receive a free Business Premier ticket after 15 return trips are booked in that class.

United shifts from survival to recovery

United Airlines has shifted its focus from survival to recovery, though executives still expect any significant pickup in demand will not happen until well into next year, with business travel demand not expected to reach pre-pandemic levels until 2024.

The airline's chief executive Scott Kirby said he expects to be the first network carrier to reach positive cash flow and that cash burn was “not the issue anymore” as United has enough liquidity to endure the pandemic.

“The light at the end of the tunnel is now visible,” Kirby said. “It's a long tunnel that will have twists and turns, but we'll begin to move back towards normal with what health experts are telling us is a widely available vaccine around the end of next year.”

“

The first time someone loses a sale to a competitor who showed up in person is the last time they'll make a sales call on Zoom”

Scott Kirby, chief executive, United Airlines



BY MARK FRARY

INDUSTRY NEWS

Postponed recovery puts more travel suppliers at risk

AUTUMN leaves have begun to fall and some companies in the sector may join them on their downward journey. As furlough schemes and other interventions have either come to an end or become less generous, business travel companies are having to make some serious decisions about what the future looks like.

Many people had initially thought that by autumn, business travel would be on the road to recovery. The recent spike in cases across Europe has scuppered that, and companies are having to think hard about their very existence. Airlines have just months of cash left and nearly 200 regional airports face closure. Many had pinned their hopes on the idea that airport testing could get the world moving but this still seems some way off.

The word I have heard more than any other across the industry recently is 'collaboration'. With a virus that ignores international borders, that collaboration will need to be unprecedented.

National lockdowns postpone recovery

New national lockdowns implemented in several European countries to combat a second wave of Covid-19 infections are set to postpone business travel's fledgling recovery even further. France, Germany and England announced new month-long national lockdowns within days of each other at the end of October, although overseas travel for work will still be permitted for residents in England. "It's good that business travel will be allowed but it's meaningless while quarantines remain in place rather than pre-departure testing," said one TMC.

TMC consolidation as pandemic bites

Thornton's Travel and Business Travel by STA have ceased trading after falling foul of the Covid-19 pandemic's devastating impact on the travel industry.

Eighty-year-old Thornton's Travel handled £4 million in business travel bookings in 2019 while Business Travel by STA was part of the wider STA Travel group that has also ceased trading. Both were members of the UK's Business Travel Association

Meanwhile, Worcester-based TMC ArrangeMy has acquired the clientbase of Gloucester Express Business Travel following the decision to retire the company in August. On the global scene, CTM has acquired Travel & Transport for US\$200.4 million, a deal that will make it the third largest TMC in the UK.

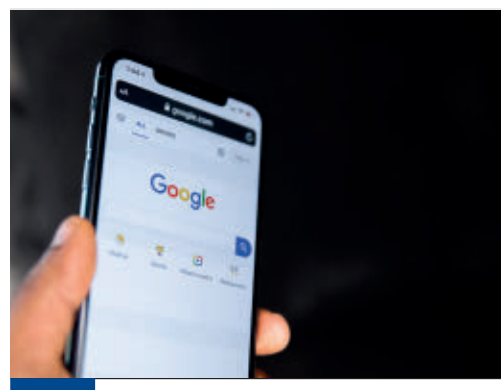
German companies predict permanent reduction in business travel demand

Almost three quarters of German companies believe the number of trips they take will reduce by 30 per cent or more after the Covid pandemic is over, and 12 per cent of the 75 companies surveyed said they expected the number of business trips to halve in the future compared to pre-pandemic levels.

German buyers' association VDR's fortnightly survey, the latest edition of which was published in October, also revealed that 94.1 per cent of those companies surveyed are currently only allowing business trips in justified exceptional cases, with 1.2 per cent banning travel completely.

ATPI expands global presence

The ATPI Group has expanded its international partner network in several key markets with the addition of Sun International in Egypt, Metroways et Tourisme in Ivory Coast and Hemisphere Voyages in Senegal. ST Travel in the Czech Republic, Business & Sport Travel in Kazakhstan, House of Travel in Qatar, and Continental Travel in Peru also join, taking ATPI's network to more than 100 offices worldwide.



©Unsplash / Solen Feyissa

GOOGLE AMONG BIG BUSINESS MOVES

Google has appointed American Express Global Business Travel as its sole global TMC in what is believed to mark a shift towards a more tightly managed travel programme for the company.

Amex GBT has also been appointed by PayPal, Palantir and Eli Lilly and Company in recent months, while BCD Travel has won the business of the US Army subject to an appeal by its incumbent TMC.

Amazon saves \$1 billion in travel costs

The coronavirus pandemic has seen Amazon save nearly \$1 billion in travel costs, its CFO Brian Olsavsky said in its third-quarter earnings call. "There's some benefits right now... travel has ground to a halt," he said, according to CNBC, adding that travel costs will resume "at a later date" but are unlikely to reach pre-Covid levels. Following the pandemic's outbreak, the company told its more than one million employees to avoid all non-essential travel in the US and abroad.

BTN Group launches BTS Kick Off event

BTN Group and *BTN Europe* are pleased to announce the launch of a new virtual event, Business Travel Show Europe Kick Off, taking place on Thursday 25 February 2021.

The new educational and networking event for senior corporate travel managers is a precursor to the live Business Travel Show Europe now taking place at ExCeL London on 22-23 June 2021, with both delivered by the Business Travel News Group.

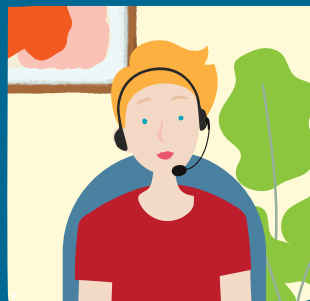
With the Covid-19 pandemic pushing the Business Travel Show further into the year, Business Travel Show Europe Kick Off bridges the gap and will provide high-quality educational content and the opportunity for Europe's corporate travel community to reconnect.

“

This event will serve as a jumping-off point for the year, filling the Business Travel Show's historic February time slot now that the event has moved to June”

David Meyer, executive director of conference content, BTN Group

Build safe, smart and effective business connections



Our dedicated UK based teams are always on hand to help you discover the right blend of face to face, virtual and hybrid solutions whenever and wherever you need us.

Get in touch with our team today to find out more.



0330 390 0340



travelevents@capita.co.uk



[capitatravelevents.co.uk](https://www.capitatravelevents.co.uk)



BY DONNA M. AIROLA

ACCOMMODATION NEWS

Hotel companies get busy during ongoing occupancy slump

HOTEL companies are trying to get creative with new offerings and services in order to attract more business during this challenging period. That doesn't necessarily mean business travel, however.

Marriott, for example, has launched a series of passes as an alternative to people working from home. The Work Anywhere with Marriott Bonvoy scheme follows a similar WFH alternative offered by Hilton earlier in October.

Oyo Hotels has seen a turnaround and during lockdown has added more than 1,200 rooms to its UK portfolio, while the Radisson Hotel Group has launched a conversion brand that allows independent hotels to join the group's global platform.

It remains to be seen if these efforts will help in their recovery. My guess is not much. Coronavirus cases are surging again, and governments are adding new lockdowns. Plus, for a true recovery, business transient needs to return, which doesn't look likely so long as companies across Europe continue with their WFH policies.

Occupancy levels on the move

Occupancy levels at the InterContinental Hotels Group improved from 25 to 44 per cent from the second to third quarters of the year, the company reported recently, with domestic travel "remaining resilient" and its Holiday Inn brand singled out as a strong performer. Nearly 200 of the group's hotels – three per cent of its portfolio – remained closed at the end of September.

Meanwhile, figures from STR show that average daily room rates in London increased in September (£93.15) but occupancy fell to 29.7 per cent, down 65.8 per cent from the same month in 2019. STR said that, as with August, the occupancy level was the lowest of any September on record in London.

BTA partners with CAP Worldwide

The UK's Business Travel Association (BTA) is launching a microsite giving its TMC members access to more than 1.3 million extended-stay providers and serviced apartments globally in conjunction with specialists CAP Worldwide.

Clive Wratten, CEO of the BTA, says: "In light of the coronavirus pandemic, it is crucial the travel sector unites to deliver shared objectives and goals."

Jo Layton, CEO of CAP Worldwide, said: "Working in partnership with the BTA community has been a goal since the launch of CAP Worldwide. I have great respect for the work the BTA does every day to support the travel sector and the membership they represent."

Accommodation booked through the BTA Long Stay Programme has been verified by CAP to meet 'Covid-19 clean' and local legal requirements.

Radisson brings independents together

The Radisson group has introduced a conversion brand, Radisson Individuals, that allows independent hotels and local chains to join its global platform while maintaining their own identity. They include the Henrietta House in Bath (opening this year) and the River House Hotel in Inverness (opening 2021).

SITU introduces instant booking platform

Serviced apartment agency SITU has launched a portfolio of instantly bookable accommodation. SITU Live: Global Network allows accommodation providers to connect their inventory, availability and pricing to SITU, while buyers can then book through SITU's customer portal or through a third-party booking tool. It aims to feature instantly bookable properties in 200 locations worldwide by December.



HYATT MAKES SWEDISH DEBUT

The Hyatt hotel group will open its first hotel in Sweden following the refurbishment of Stockholm's Hotell Reisen. It will join eight European hotels under The Unbound Collection by Hyatt brand

which also includes London's Great Scotland Yard Hotel and the Hôtel du Louvre in Paris. Meanwhile, The AC Hotel Stockholm Ulriksdal will become the first Swedish hotel for Marriott's AC brand.

Marriott woos the WFH market

Marriott is to offer day passes at selected hotels to give remote workers the opportunity to have a change of environment. Passes will give access to a hotel room, wifi, food and drinks, and business facilities such as printing, fax and scanning equipment, where available. Bonvoy members will receive additional perks. Day Passes in London start from £139 at the St Pancras Renaissance, £140 at the Marriott Grosvenor Square and £59 at Aloft London ExCeL.

Amex GBT adds green hotel identification

American Express Global Business Travel has added new functionality to its Neo online booking tool designed to help users create dedicated green hotel programmes.

The new feature will allow travel managers to flag individual properties or chains that meet certain environmental standards using a green badge listed in search results. These standards could be one of the many industry eco-labelling schemes or the bespoke requirements of the company itself.

Neo already has the ability to filter modes of transport by carbon emissions based on figures from the UK's Defra and France's Ademe, while electric and hybrid vehicles will also be added.

“When users see a trip's carbon footprint at the point of booking, it enables them to make better-informed decisions”

Vincent Bourbonnais, head of travel product, Neo



BY ADAM PERROTTA

TECH & PAYMENTS NEWS

TMCs leverage technology for new ways to serve clients

AS TMCs seek to expand their value proposition beyond simply providing booking services, many are emphasising tech-based tools designed to fulfill a range of client needs.

American Express Global Business Travel is among the major TMCs to double down on this approach recently by acquiring AI-based travel management and booking messaging platform 30SecondsToFly, while also adding an environmental sustainability badging feature to its Neo booking tool to help clients build greener hotel programmes.

Covid-19-related services have been another area of emphasis, with Global Travel Management and TravelPerk rolling out virus tracking tools to help travel managers meet the duty of care responsibilities that have become more important than ever amid the ongoing pandemic.

And as companies seek to limit booking leakage and mine travel data for saving opportunities, TMCs are eyeing tech-based services in those areas as other promising ways to demonstrate their value.

Expenses expansion from TripActions

TripActions is bringing expense management and payment products under one roof, adding in-house expense management functionality to its Liquid payment card in the US. The integrated system will be available in Europe from the end of this year or early in 2021, says the company.

First launched in February, the Liquid platform features physical and virtual Visa-branded credit cards that can be used to book travel via TripActions' and other booking tools, and to make in-trip payments. Previously, purchases made via Liquid were sent to whichever third-party expense management system the client used. Now, the whole process can be completed within the Liquid platform.



TravelPerk opens up with API offering

Travel management platform TravelPerk has launched a subscription service offering real-time information on the Covid risks and restrictions faced by business travellers. It is also opening up its services to partners, customers, developers and other players in the travel sector through an API.

The duty of care service, called TravelSafe API, can be integrated into company websites and apps and gathers information on restrictions between any two destinations from official sources, cross-referenced by customer care agents. It is included for TravelPerk clients in its TravelCare offering but is available as a monthly subscription service to others.

FCM debuts AI reporting tool

FCM has launched a new reporting tool powered by artificial intelligence that allows users to query a company's travel data using natural language search requests and have it turned into actionable insights. The TMC says the AI Reporting Tool is "akin to a search engine for travel data".



TRAXO SIGNS ADVANTAGE & WIN DEALS

Traxo has signed deals with the UK's Advantage Travel Partnership and WIN Global Travel Network to allow consortia members to offer clients a tool that tracks programme leakage and gives

greater visibility on travellers' movements in times of crisis. It will enable corporates to share all booking data with their TMCs in real time, including for bookings made outside the TMC channel.

Corporate card spending inches up

After bottoming out at US\$82.8 billion in the second quarter of 2020, spending on American Express corporate cards rebounded to US\$98.5 billion during the third quarter of the year, but that figure was still down 23 per cent year over year. Average third quarter cardholder spending was also up compared with the second quarter, increasing to US\$6,776 from Q2's US\$5,645 average, but was 21 per cent lower compared with the previous year.

GTM enhances duty of care offering

Global Travel Management, based in Woking in the UK, has launched an online tool to help its clients manage duty of care obligations and keep abreast of Covid-related travel restrictions.

PinPoint combines traveller tracking, UK government travel and local Covid lockdown rules as well as guidance and warnings from travel risk platform Safeture. The tool allows managers to communicate with employees directly from the platform or by email or text message.

PinPoint's traveller tracking tool instantly shows the location of employees on a colour-coded map. It is also possible to view the whereabouts of employees for past dates and where they plan to travel in the future.

“

The duty of care companies owe to their employees has never been more important”

Scott Pawley, managing director, Global Travel Management

LOUD & CLEAR

Professor Denis Kinane, co-founder of Cignpost Diagnostics, argues the case for rapid PCR testing as quarantine restrictions continue to stifle travel and economic recovery

Quarantine is ruining the recovery

“ Travel quarantine requirements are prohibiting travel and must be revised if the UK economy and travel is to recover. While the 14-day quarantine period is a legal requirement, given the natural biological course of Covid-19, I believe it is irrational and, with the utilisation of appropriate testing, unnecessary. A rapid PCR test conducted prior to or upon arrival at major hub airports like London Heathrow should help alleviate the need for quarantine conditions.

An accelerated PCR test would mean that within as little as three hours, a traveller with a negative test result would know they do not require a lengthy quarantine period after arriving in the UK. Such a programme could instil far greater confidence and compliance from members of the public and help kick start the travel industry.

Simply stated, the current 14-day quarantine is excessive, damaging to the economy and unnecessarily obstructive to the UK getting back to normality. We should be testing for Covid-19, watching for symptoms, observing viral hygiene, social distancing and wearing masks, but we should not have to be enforcing quarantine when airport testing regimes could negate this.

”





At **SWR** we are doing everything we can to keep you safe when travelling by train. Get our free Touch Smartcard and you can book a range of tickets online from home, before you travel, to minimise contact at every stage of your journey.

Search '**SWR smartcard**'. Stay safe. Travel Smart.

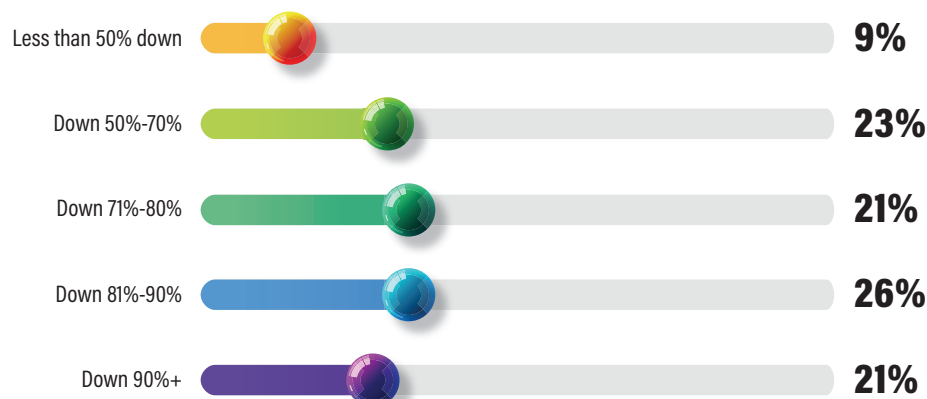
South Western
 **Railway**

THE NEW NORMAL

BTN's State of the Managed Travel Industry survey shows how corporates are adapting their travel programmes in preparation for getting back on the road. Conducted in September, the survey results on these pages present the attitudes of more than 200 travel managers with responsibility for European travel programmes, together with recent GBTA research

2020 TRAVEL VOLUMES

Expected change compared to 2019



63%

of European business travel executives and

43%

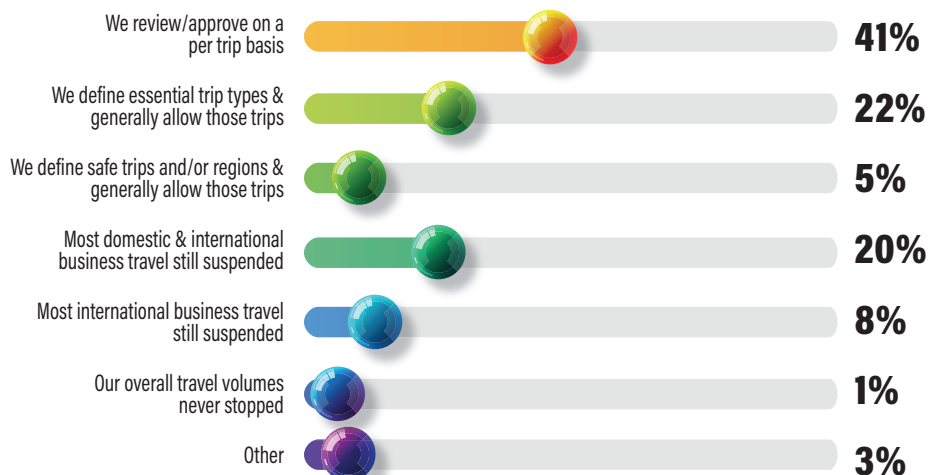
globally cite government travel restrictions and policies, such as quarantine and entry restrictions, as the greatest barrier to travel

(Source: GBTA member survey conducted October 12-16)



RETURNING TO TRAVEL

Corporates' current approach

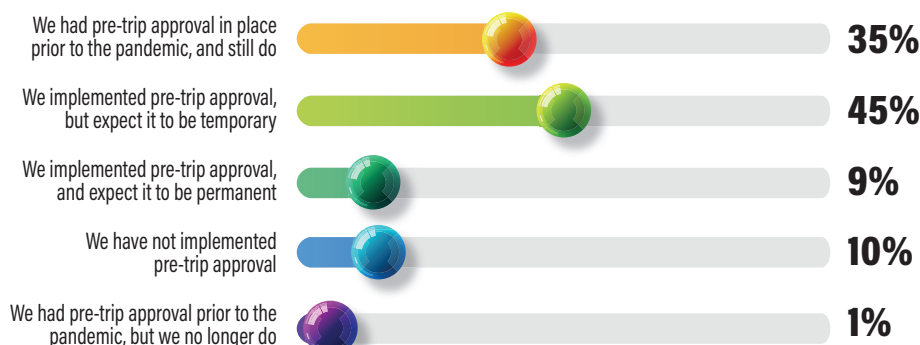


82% of business travel executives feel face-to-face meetings are more or much more effective than virtual meetings

(Source: GBTA member survey conducted October 12-16)

PRE-TRIP APPROVAL PROCESSES

Changing corporate attitudes



94%

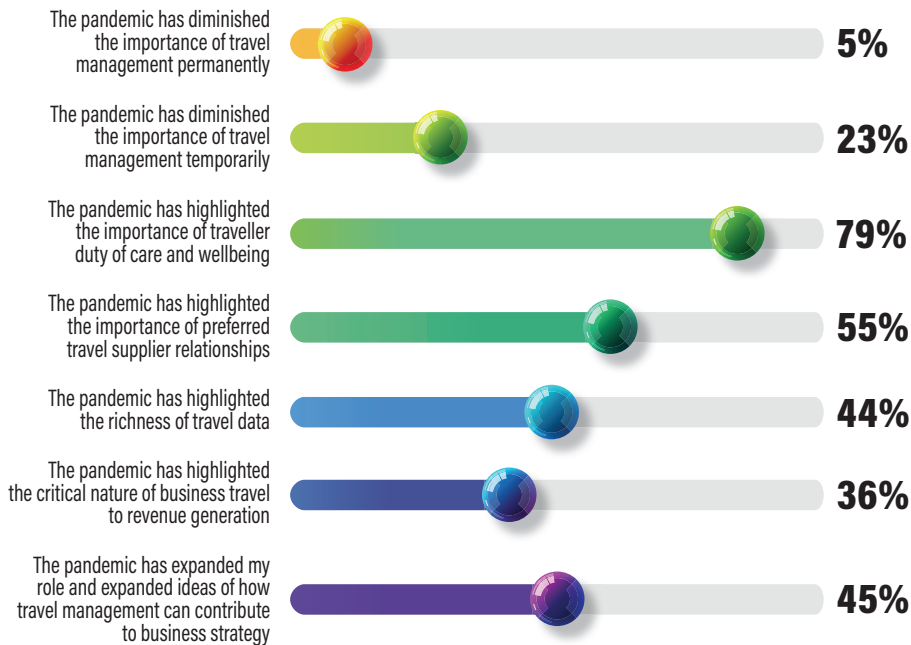
of business travel executives have not taken a commercial flight for business travel purposes since March 2020

(Source: GBTA member survey conducted October 12-16)



TRAVEL MANAGEMENT PROFILE

Visibility of the function (more than one choice possible)



61%

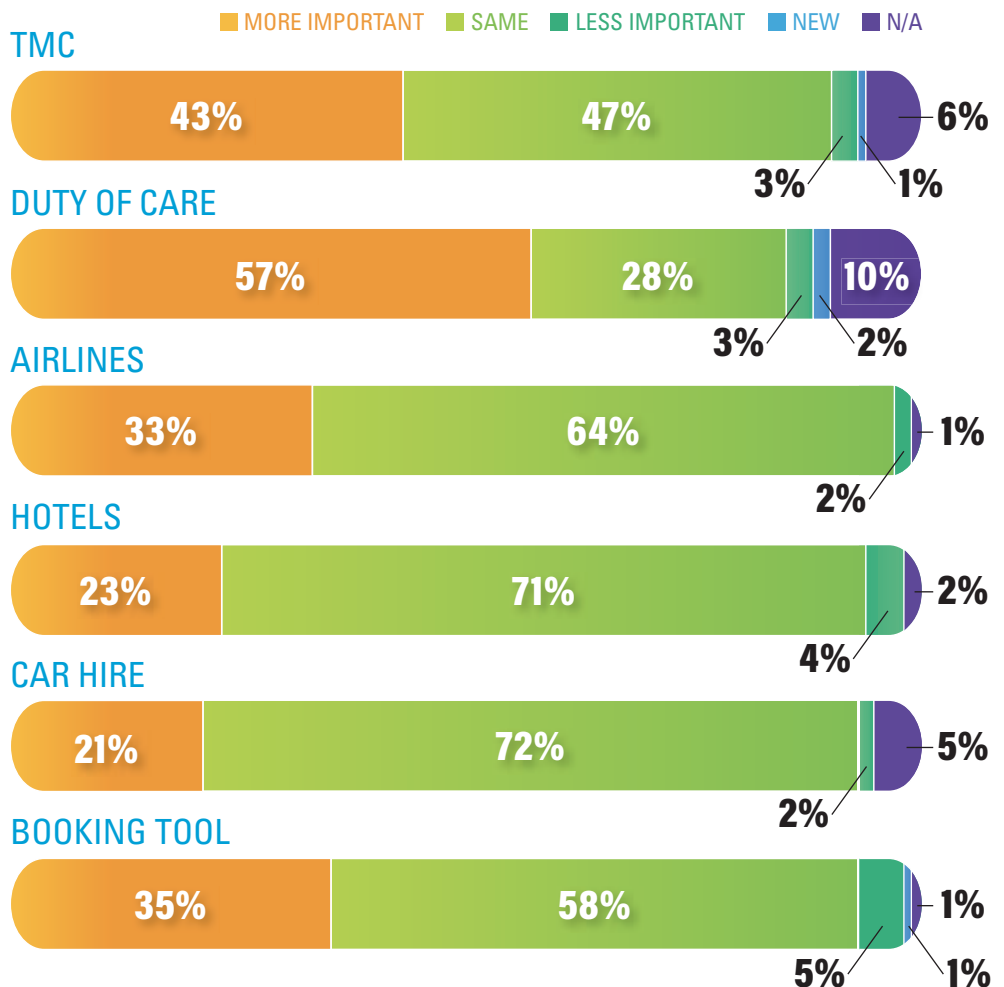
of companies have the same or similar policies for travel to all European countries, while

31% said their policies vary by country

(Source: GBTA member survey conducted October 12-16)

PREFERRED SUPPLIERS

The changing importance of supplier relationships



32%

of companies believe international business travel will resume within six months

9%

said in the next two to three months

25%

said in eight to 12 months

8%

said more than 12 months

26%

were unsure when international business travel will resume

(Source: GBTA member survey conducted October 12-16)

PREDICTING THE (ALMOST) UNPREDICTABLE

2021 LOADING...



After a year like no other, *BTN Europe* has canvassed a range of business travel industry leaders to see what they think – and hope – 2021 has in store, no matter how difficult it seems right now

This time last year the very first case of coronavirus had not been recorded, furlough was a little-known word, and social distancing was merely the fallout of inimical separations.

Since then, shares in videoconferencing companies have skyrocketed, 'new normal' has become a global catchphrase, and international travel has ground to a halt to the detriment of an enormous global industry.

Nobody could have predicted what was about to be unleashed on the world when we published the 2020 Outlook in this magazine's previous guise as *Buying Business Travel* some 12 months ago. It goes to show how difficult it is committing a prediction to paper as to how the year ahead will pan out, so kudos to those who have taken part in our 2021 Outlook in particularly challenging and unpredictable circumstances. Many have expressed a degree of confidence in the return of

business travel, with predictions in recent weeks varying among corporates and TMCs from 30 per cent to 80 per cent of 2019 volumes.

ITM's most recent buyer survey showed 52 per cent of travel managers expect their company's business travel volumes to fall by more than half in 2021 (compared to 2019). More than a third (38 per cent) expect a 25 to 50 per cent decrease and eight per cent forecast a more moderate zero to 25 per cent slump.

In other findings, 88 per cent expect an increase in virtual tech as an alternative to travel in 2021, 80 per cent say the importance of traveller wellbeing will grow, and more than two-thirds will be looking to increase traveller engagement and expect to see senior level travel approval continue.

Meanwhile, a recent report from Credit Suisse, *Beyond the pandemic: Sizing corporate travel recovery prospects*, predicted a 65 per cent decline in international business travel in 2021 versus 2019, and a gradual recovery to within 10 to 20 per cent by 2024, with “internal travel driving the key structural reset”.

However, so much hinges on the reopening of international borders, Covid-19 testing regimes at airports and, ultimately, the widespread availability of an effective vaccine.

“Once a vaccine is available/provided at a critical scale on a global basis, we expect international corporate travel to move towards the ‘new normal’ level,” noted the report. “Therefore, 2022 should see recovery gain more momentum... yet we think it is unlikely that corporate travel budgets will be fully reinstated and see a 60-70% recovery on 2019 as reasonable.”

It's not surprising that, to date, few of the mega TMCs have issued their annual forecasts detailing the travel trends and rate movements we might see in the coming year. Nevertheless, BTN's State of the Managed Travel Industry survey provides insight as to what travel managers expect in 2021 and you'll find attitudes around rate expectations, preferred supplier structures and RFP categories displayed within this Outlook.

How might 2020 have panned out if Covid-19 had not reared its ugly head? Last year's Outlook largely focused on uncertainty around Brexit – “challenges surrounding exchange rates, borders and visas will escalate” – as well as the rising profile of sustainability.

“There is conflict about being more sustainable and driving the business, but AstraZeneca now has an absolute focus and commitment to it,” said Kerrie Henshaw-Cox, the company's global category lead, in last year's report. “We have a 10 per cent year-on-year target to reduce carbon emissions. That's a big reduction. We are going to have to stop travelling how we used to,” she noted, not knowing how prescient her words were.

There was also a nod to the acceleration of NDC, while modest rises across air fares, hotels rates and car rental costs were forecast by the likes of CWT, BCD and American Express Global Business Travel, with the caveat that “the corporate travel sector is no stranger to uncertainty”. No truer a word spoken. Read on to discover the thoughts and predictions for 2021 from a range of travel industry leaders.



Mark Cuschieri,
global travel lead, UBS

LIMITED RECOVERY

We're not going to see 2019 levels of business travel for a number of years, if at all. We expect the return to travel to be slow, perhaps 30-40% in 2021, but there are so many factors that make this difficult to forecast.

People won't be travelling as much and many have seen that we can actually do our jobs effectively and profitably without travel in some cases. There are still those important meetings that absolutely need to be done face to face but the non-essential travel will become more selective. I think we all have to take a step back and reset our travel programmes.

It's one thing switching travel off but it's a lot harder turning it on again when we don't really know what it looks like yet. Right now, only 18% of our 500 key global routes are operating without travel restrictions.

The prioritisation of sustainable travel will remain the same as the industry gets moving again, and it will remain a key strategic component of our travel programme. We must maintain that. The concern is whether there will be the investment on the supplier side to maintain that and we hope it will continue. It's critical for everybody and our organisation and we've made that very clear.



Clive Wratten, chief
executive, The Business
Travel Association (BTA)

GOVERNMENT INTERVENTION

In 2021, it's vital that we rebuild our industry infrastructure, restore traveller confidence and reignite business travel. Achieving this will require collaboration right across our ecosystem, and a need to work in partnership to develop new models for business travel in this Covid world.

Airport testing is a crucial part of this. The UK's Global Travel Taskforce must work with industry to quickly establish a robust programme enabling Covid-secure business travel from UK airports to key global destinations.

With demand not anticipated to return to pre-pandemic levels until 2022 at the earliest, the government must support the business travel industry with measures that go beyond the inadequate Job Support Scheme.

Business travel contributes £220 billion to UK plc in a normal year. The thousands of jobs lost in our sector will hamper British business' ability to travel and trade – something which is crucial in a post-Brexit world.

Given the current inertia, we believe a new voice for our industry is needed at the heart of government. A newly established Minister for Travel would provide that and could lead the drive towards safe, positive solutions to re-ignite our economy and get Britain moving.

“

**In 2021, it's vital
that we rebuild
our industry
infrastructure,
restore confidence
and reignite
business travel**



Matthew Tringham,
chief strategy and
product Officer, Skytra

AIRFARES ANALYSIS

Passengers are now booking their flights later than before, although for the moment shorter flights are recovering more quickly than longer flights. The Asia Pacific Market, particularly the Chinese domestic market, is recovering most quickly right now.

This is shown when we look at where bookings stand for Q1 2021 compared to the last complete month. Asia-Pacific, Europe and North America sales to date for Q1 2021 are down by 80-90% but the last complete month (September 2020) closed 55% down in APAC, 70% down in Europe & N. America. We would expect a similar effect as we get closer to Q1 2021 – an increase in bookings meaning sales will pick up around the end of the year.

Airlines have been adapting their pricing to capture value where they can which has led to increased volatility and also discounting of tickets for travel within 30 days, but also increases in price for travel further in the future, particularly for long-haul travel.

In Europe and North America tickets are cheaper than last year. Travel within the next 30 days is discounted 25%-33% and travel for Q1 2021 is currently discounted 10%-20% within each market but across the Atlantic is 25% more expensive.

In the Asia-Pacific market prices are back where they were in 2019 for travel in the next 30 days but tickets for Q1 2021 are up to 50% more expensive than at the same point last year for travel in Q1 2020. The markets to and from Asia are similar with the same or higher pricing compared to last year be it for immediate travel or Q1 2021.



Scott Davies,
chief executive, Institute of
Travel Management (ITM)

SLOW RETURN

Forecasting has always been part financial modelling and part educated guesswork. ITM's buyer members report that trying to forecast 2021 travel volumes and values is beyond challenging.

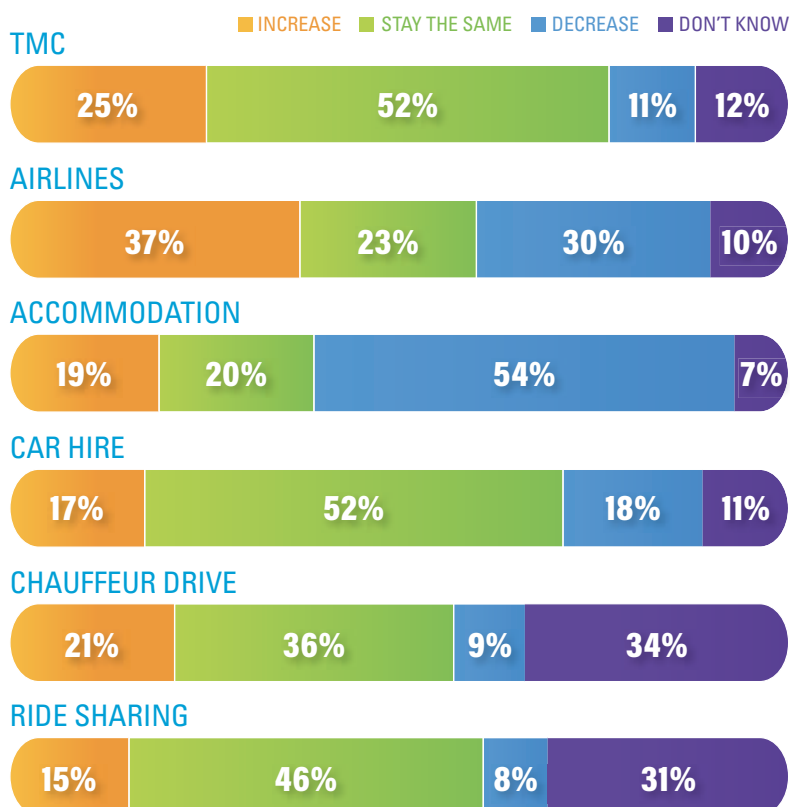
The impact on the 35-40% of travel spend that typically relates to internal meetings may be somewhat imaginable, albeit none of us know for sure the path the pandemic will take next year.

Most people agree that we can't wait to once again conduct business in the way it's best done - face to face. ITM's buyers are now increasingly predicting that 2021 travel will be somewhere between 25% and 50% of its 2019 baseline.

The perilous job security and loss of talent in our industry are a stark reality. Every one of us has a role to play to spread hope and optimism and to inject confidence into the perception of safe travel going forward. Let's keep holding each other up. Better days are coming.



2021 RATE EXPECTATIONS



Source: BTN's State of the Managed Travel Industry survey conducted in September 2020 and featuring more than 200 responses from travel managers with responsibility for European programmes



Lotten Fowler, general manager, Swedish Business Travel Association (SBTA)

TRAVELLER CONFIDENCE

It's going to take time for business travel to return to pre-covid levels. In the Nordic region many companies are using the opportunity to tighten sustainability programmes regarding travel, which is aided by the fact that web-based meetings seem to work in many cases. It might take until 2024 until business travel comes back fully.

The most important factor needed to get business travel back on track is rebuilding traveller confidence. The current situation with little or no coordination between countries in how to deal with the pandemic creates uncertainty on so many levels.

The industry needs to push for common standards and procedures and our governing bodies need to coordinate how they deal with the pandemic and communicate restrictions. Travellers and companies will keep staying at home until they are certain that the information they get at the time of booking or travel is correct. Countries closing borders from one day to another does nothing to install confidence.



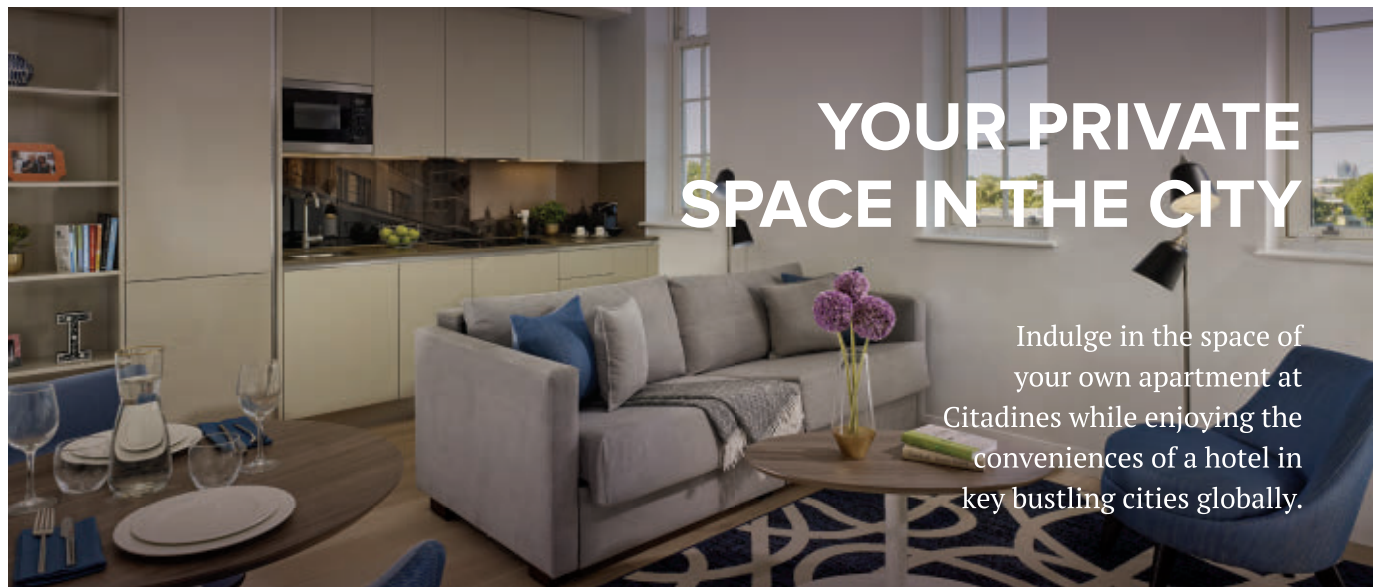
Matt Gatenby, senior partner, Travlaw

LEGAL OUTLOOK

With 2020 being an 'annus horribilis' for the majority, eyes are understandably already turning to 2021 and from a legal perspective it could be a huge year. Frustratingly, we just don't have the detail to say exactly how, as the vast majority of issues are going to surround Brexit – everything from aviation rights to visas, potential changes to the Package Travel Regulations, and so on.

Perhaps the biggest concern is simply that UK government clearly doesn't have a legislative programme in place given they have had to clear the decks to focus on Brexit and Covid. We know the majority of EU laws will continue to apply, but 1st January 2021 opens the door for changes at UK level.

Fortunately, the business travel community is strong. Given 2021 also promises an upturn in travel as we recover from Covid, the basis is there for it being a year of challenges we can at least tackle head-on, together.



Indulge in the space of your own apartment at Citadines while enjoying the conveniences of a hotel in key bustling cities globally.

citadines
APART' HOTEL

Ascott Cares - our commitment to hygiene and cleanliness
www.citadines.com | +44 (0) 20 3119 3405

Bali | Bangkok | Beijing | Berlin | Brussels | Hong Kong | London | Melbourne | Paris | Singapore | Tokyo and in over 180 cities spanning more than 30 countries worldwide



Christoph Carnier,
German business travel
association, VDR

CHANGING PRIORITIES

The topics considered important in the medium-term – such as process optimisation, sustainability and cost reduction – are going to regain significance going forward into 2021.

Business trips and personal contact will continue to be an important part of the business activity of German organisations long after the coronavirus pandemic. They serve a purpose and are an economic necessity.

Face-to-face communications between people and companies will remain important and cannot be permanently replaced by virtual communication tools. Trust is difficult to build virtually.

Even if the structure of business trips changes in the future, the vast majority of business travel experts at VDR member companies estimate declines in travel activity of between 10 and 30 per cent in the long term.

How quickly business travel will recover also depends on how responsibly each individual deals with the pandemic and whether politicians succeed in creating a practicable, transparent and, as far as possible, uniform political framework in order to win back the confidence of companies and their travellers and travel managers.

More than 50 per cent of our member companies surveyed are planning to resume business trips within Europe in the short term. Subsequently, more intercontinental travel will also increase, provided that entry regulations allow it.



Jane Longhurst, chief
executive, The Meetings
Industry Association

MEETINGS AND EVENTS

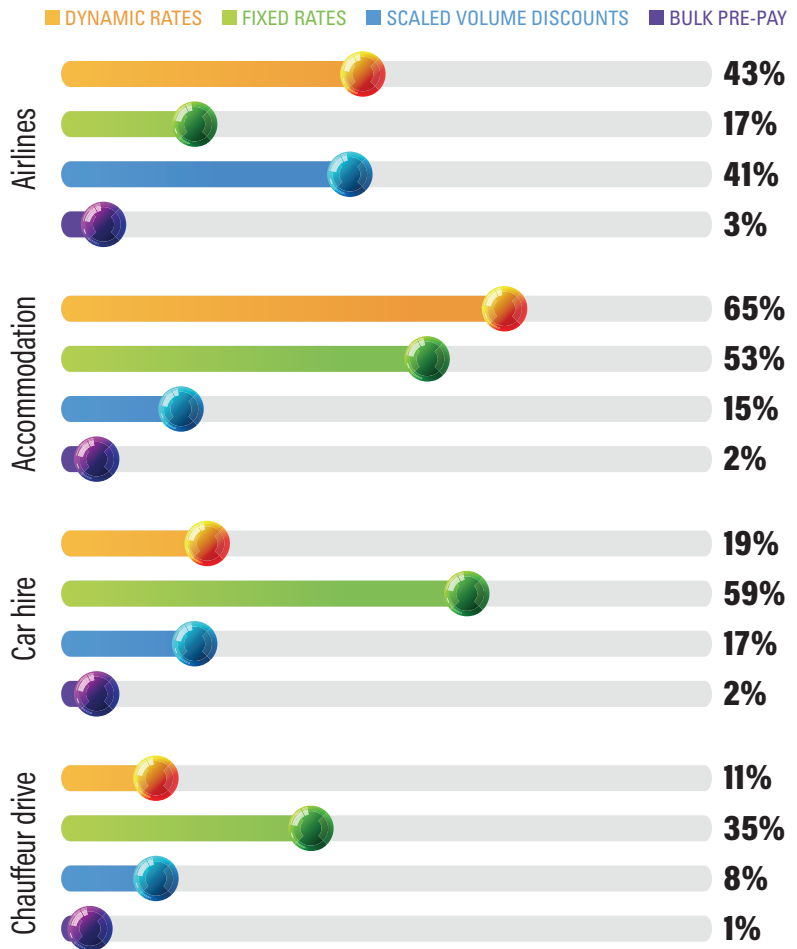
Currently, without a much-needed date for larger-scale events to return, bookings are automatically diminished as the required lead times eliminate this significant business for the first half of 2021.

Without clarity from government, consumer confidence will remain at an unfeasible level, and while recovery will be a long-term project, it will require venues to continue to demonstrate that they are Covid-secure in order to convert indispensable bookings for the near future.

As we continue to lobby for the necessary government support, we remain confident that venues have the capabilities to manifest viable business across the supply chain in 2021, kickstarting the industry's recovery upon reopening.

Unfortunately, by engaging with our members and the business meetings and events industry throughout the course of the pandemic, we also know that not only venues but the entire supply chain has endured devastating losses. Sadly over 126,000 job losses have been forecast to date and a growing number of organisations are facing liquidation.

FUTURE RATE STRUCTURE PREFERENCE *(More than one choice possible)*



Source: BTN's State of the Managed Travel Industry survey conducted in September 2020 and featuring more than 200 responses from travel managers with responsibility for European programmes



Emma Gregory,
director, Urbanberry
Recruitment

THE RECRUITMENT MARKET

2021 is set to be a fairly unpredictable year in terms of the timescale for recruitment in the travel industry. It's widely believed the luxury and leisure market will initially see significant growth with corporate following at a steadier pace.

With mass redundancies in 2020 across the corporate market in particular, some consultants have taken the opportunity to follow their dream of being travel franchise owners. With salaried roles scarce, we've seen an uptake of skilled reservations staff launching their own travel business ahead of the predicted bounce back. When leisure and corporate are able to start moving again, those who have taken the leap will surely be in fantastic positions to create their own futures in 2021.

We're hoping to see new positions created rapidly as organisations who had no option but to scale back start to rebuild in relation to travel demand. The right hires will be essential for every company.

“

We're hoping to see new positions created rapidly as organisations who had to scale back start to rebuild in relation to travel demand



**An anonymous
TMC employee
speaks out**

AN UNPOPULAR OPINION

Everyone seems confident that business will return in 2021 but I'm not so sure, and I know that's an unpopular opinion. I certainly don't believe it will return to anything like it used to be, even in the long term, and I think most people accept that. Even so, there's a lot of confidence within the industry but are we just existing within our own echo chamber? Too many people think this is a flash in a pan and there's too much bluster.

As a TMC, we're still cost-cutting and we won't be travelling internationally any time soon. A lot of people are realising they just don't need to travel in the same volumes they used to and I don't think we'll see the return of internal travel in 2021. There's a lot of inter-office travel disappearing as offices close across the country and it's been shown Zoom can replace it.

Everyone said travel would come back in September, then it was October but we're nearly in November now and it's still so slow. People



**Thomas Emanuel,
director, STR**

HOTELS' TORRID TIME

We project 2021 to be another incredibly difficult year for hotels across Europe. Whilst we do expect to see performance improvements from 2020, it's clear the industry will still be significantly below pre-pandemic levels.

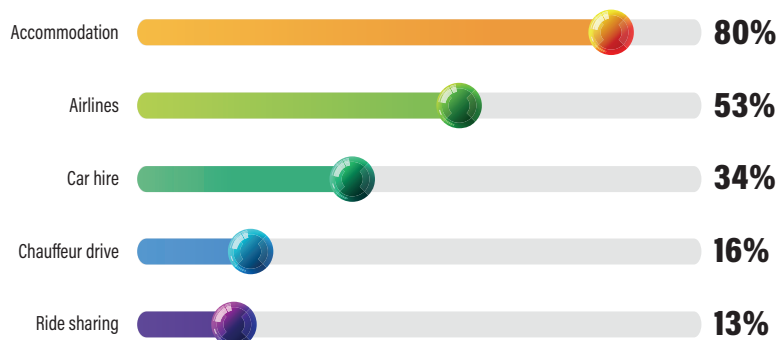
So much is dependent on potential vaccines, a lifting of international travel restrictions, the return of consumer and traveller confidence, and economic recovery. The further we move into 2021, the assumption is that we can expect to see improvement in these areas, and we would expect hotel performance to follow suit.

Demand in 2020 has been almost exclusively driven by the domestic leisure traveller, so naturally those markets which are more reliant on corporate, conference and international demand will see a greater increase if circumstances allow.

Likewise, some leisure-driven markets may find 2021 more competitive if travel restrictions allow for international travel to start again in earnest.

NEGOTIATING RATES

Which categories do you expect to negotiate rates for 2021?



Source: BTN's State of the Managed Travel Industry survey conducted in September 2020 and featuring more than 200 responses from travel managers with responsibility for European programmes

thought everyone would be jumping on planes when lockdown ended but there's no sign of that yet and the cash will run out at some point.

I don't know how some TMCs are staying afloat and I really fear that we're going to see more failures throughout 2021. We have solid backing and others have owners with deep pockets but I'm surprised not more have gone under already. It's awful and I think it's going to be ghoulish picking over the spoils. We need to prepare for the worst and not just keep our fingers crossed.

What TMCs need to do in 2021 is to innovate. We need to pivot and look at what else we can do but there's real resistance to that. I love this industry but we need to get together and chart the way forward.



**Mike Molloy, global
category leader for travel
and expense, Rio Tinto**

A CHALLENGING YEAR

2021 is going to be a challenge. Domestic travel may come back up to 50 per cent or more in certain markets depending on Covid abatement. International will still be slower to return – perhaps up to 30 per cent by year-end depending on vaccine deployments and therapeutics advancement.

I have seen a lot of ups and downs in this industry. It seems every few years something comes along that some people say will be the end of corporate travel or that it will never be the same, but I am broadly optimistic about the corporate travel industry.

Firstly, people have the desire to meet and interact with others – we are social beings. We want to explore other cultures, we want to sell and trade, and we want to interact and learn from others.

Secondly, we have the power of demographics on our side. China, India, Indonesia and Africa all have growing populations with growing middle class populations that have disposable income and who want to travel the world for leisure and who will need to also travel for business.

Whether it's 9/11, SARS, the global financial crisis or the unpronounceable Icelandic volcano, each and every time, corporate travel has come back in higher numbers than ever before and I have every expectation it will do so again.

“

**Corporate travel has
come back in higher
numbers in the past
and I expect it will
do so again**

Writing off the losses

There is a widely held view that business travel might never return to 2019 levels, but that's not necessarily a bad thing



BY AMON COHEN

It's a small but highly symbolic moment for me – I will very shortly be compelled to go out and buy a pen for, I believe, the first time in my 28 years as a business travel journalist. I'm down to one last ball-point from TQ3 Travel Solutions (renamed BCD Travel in 2006) that I found at the back of a desk drawer, then that's it.

My pen crisis has arisen because, like everyone else, I normally acquire them without much thought at meetings and conferences. But as I haven't physically attended a work event since the Business Travel Show back in February, I now find myself pen-less, a tiny domestic metaphor for – much more worryingly – how the travel industry is becoming penniless.

At the other end of the scale of physical symbolism, I recently drove, by chance, past an airfield in the middle of the Gloucestershire countryside called Kemble, aka Cotswold Airport. Kemble has a long runway and thus is used both as a scrapyard and parking lot for unwanted commercial jets. On the day I skirted its perimeter, I saw Boeing 747s and other aircraft belonging to British Airways, Iberia, KLM, Adria, Saudia, Icelandair and IndiGo all marooned on the tarmac. Sometimes you need the evidence of your own eyes to comprehend dramatic change. I confess it shook me.

The two questions everyone in business travel wants the answer to, but no one knows, are when will the market recover, and to what extent? With regard to the first, it

remains unclear whether bookings will only revive once vaccination is widely available. Will that be the moment governments drop quarantine requirements for international visitors, or will they do that earlier as economic pressures mount and passenger virus testing gains acceptance? Would business people feel comfortable travelling even if the threat of quarantine were removed?

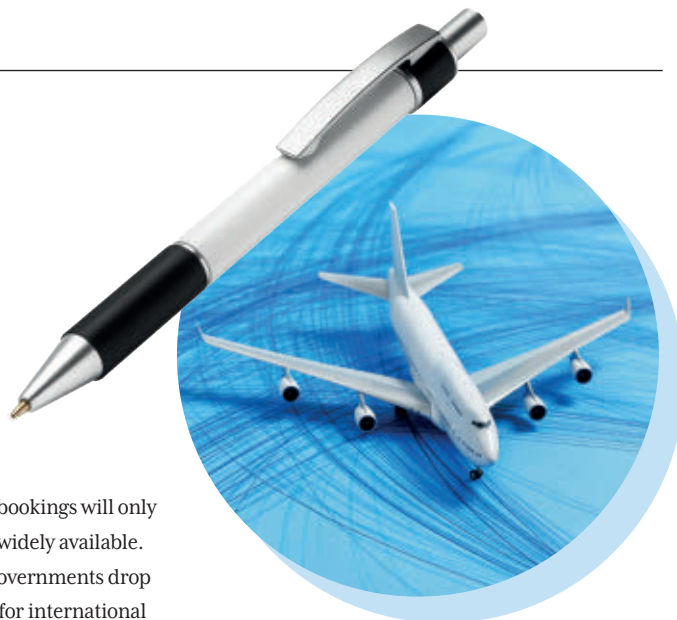
These questions are complicated enough, but actually I think for those of us connected with travel management, the uncertainty runs even

“

Employees will be less stressed if they travel less and we also have to consider the environment

deeper. It's not just that we don't know when or how much travel will return; we aren't even sure what we would like those answers to be. Let's imagine, for example, the wildly unlikely scenario that business travel recovers fully to 2019 levels by the end of 2021. Would that be a good or a bad outcome? When thinking about volume of travel, what does 'good' look like?

The only real way to achieve some key objectives much discussed by travel managers in recent years – environmental sustainability, traveller wellbeing – is for there to be less



business travel than before. In fact, Jörg Martin, principal of Germany's CTC Corporate Travel Consulting, forecasts volumes never to return above 75 per cent of 2019 levels – and he considers that a positive outcome.

“It's not good for our own industry but we have to start thinking differently,” he told me. “Employees will be less stressed and more efficient if they travel less, and we have to consider the environment.”

Some companies are already thinking differently. Boston Consulting Group, for example, announced in September that it will reduce travel-related carbon emissions by 30 per cent per employee by 2025 in order to deliver net-zero climate impact for its entire business by 2030.

That's not to say all business travel is wrong. Far from it. We're all appreciating by now how much is missed not just personally but professionally through being grounded for so long: we pick up a lot more than pens when we gather at conferences or for private meetings. But a re-set, especially for some business travel addicts, was long overdue. 'Good' means resuming travel, but much less than we used to.

• *Amon Cohen is a specialist business travel writer, conference moderator and media trainer*



GET TO WORK FEELING SAFE

(And sound)

**COVID
AWARE**

[LNER.co.uk/covid19](https://lner.co.uk/covid19)

We've reduced the number of passengers on our trains. So if you still need to travel for work, we'll get you there with care. **This is our**

LNER

LONDON NORTH EASTERN RAILWAY



LOSING CONTACT

The concept of 'touchless travel' is accelerating in a new environment where preventing the spread of Covid-19 is paramount, writes **Andy Hoskins**

In a world of social distancing, face masks and hand sanitiser, the whole travel ecosystem is scrambling to adopt procedures and technology that eliminate human contact and the touching of common surfaces. Strange as it may seem, an industry that exists to unite people is now doing its best to keep them apart – at least for the duration of their journey.

The urgent need to prevent the spread of Covid-19 has given greater momentum to a trend already underway – the automation and digitisation of travel, from the airport and onboard experience, to payments, ground transport and accommodation.

"The pandemic is showing us that contactless travel is something that will have to develop faster and more efficiently and effectively," says Mark Cuschieri, global travel lead at UBS.

"This is something that was happening anyway but Covid is only going to accelerate this now. Suppliers will be looking at their strategy to make services work better in this respect. It's all

about creating confidence in travellers and most suppliers are doing a great job. I see a lot more happening in this space," he adds.

While a vaccine remains out of reach and airport testing regimes vary widely, the need to breed traveller confidence continues to permeate the travel industry and technology providers are pulling out all the stops.

"The pace of change has increased dramatically and now there is the opportunity to accelerate technology adoption further to look beyond conventional models and to redefine the passenger experience," noted Amadeus in a recent report. "Touchless or low-touch self-service processes provide clear advantages for minimising the spread of pathogens, and they build confidence in passengers who no longer feel comfortable touching many surfaces in public. Touchless travel has become a priority for airports and passengers alike."

Ana Gibson, travel manager at Hilti, believes the concept of touchless travel is an important

element in generating traveller confidence. "The fewer touchpoints you have and the more automation there is, the better." She continues: "I've been looking at what hotels have been doing in particular and the more they're doing in this respect, the more trust we have in them that they're taking the whole thing seriously."

ROOM FOR IMPROVEMENT

Nicola Cox, director at Midas Travel, says requirements of the TMC's clients vary greatly. While technology is a great enabler, many travellers still like a warm welcome at check-in, she says. "Travel remains a service-led industry and the current self-service technology doesn't always deliver the best traveller experience," says Cox. "Travel technology isn't fully synchronised yet. For an end-to-end touchless travel experience, a traveller may be required to download multiple apps for a single journey."

Reliance on smartphones can also cause issues in the inevitable instance of a flat battery,

something that “has resulted in a few of our guests getting locked out of their rooms late at night.” In contrast, the TMC has witnessed an uptick among clients in the use of airline apps, mobile train tickets and virtual payments for hotels.

PUTTING IT INTO PRACTICE

While checking in for a flight on an app is common practice, Amadeus and ICM Airport Technics have worked with Norwegian airport operator Avinor to implement an ‘end-to-end’ touchless experience.

In what Avinor calls “a small contribution to the international effort against the coronavirus”, passengers travelling with SAS, Norwegian and Wideroe can now check-in, drop their bags, pass through security and board the aircraft without interpersonal contact. The whole process is enabled by the issuance of a barcode upon checking in for a flight.

Touchless technologies such as biometrics, artificial intelligence and digital identity management are coming together at the right moment to change the nature of our journeys, says Stefan Ropers, Amadeus’ president of strategic growth businesses. “These are not necessarily new innovations, but the pandemic has accelerated their adoption across the travel industry. We can now expect the adoption of this technology to be fast-tracked around the world.”

Ropers continues: “For many consumers during the lockdown period, touchless technologies became the main way they accessed goods and services, whether that be through contactless payments or the swipe of a mobile app from the safety of their homes.” As so often happens, consumer trends play out soon afterwards in the business travel arena too.

NEW STANDARDS

Aviation authorities IATA and ICAO, as well as aviation tech specialists SITA and Elenium Automation, are among the various organisations to have published blueprints for the future of touchless travel.

A report from Elenium and SimpliFlying includes recommendations for an almost touchless airport and onboard experience (see panel), such as the adoption of biometric technology, electronic health certificates, virtual queuing, digital food and drink menus and ordering, self-cleaning lavatories on aircraft, and the implementation of advancing scanning that eradicates the need to remove liquids and electronics at security.

“Ideally, it would not have taken the tragedy of the global pandemic for the industry to embrace touchless technology wholeheartedly, but I’m convinced that the end result will in many ways be better and more seamless all round,” says SimpliFlying CEO Shashank Nigam.

Among Elenium’s recent developments is the launch of the Voyager App for Etihad Airways that enables passengers to upload biometric data before arriving at



THE ULTIMATE TOUCHLESS AIR TRAVEL EXPERIENCE

A study by Elenium Automation and SimpliFlying identified the potential implementation of technology to deliver a touchless travel experience

1. Before travel

- Biometrics enrolment
- Schedule appointments for check-in security and lounge
- Book door-to-door baggage service
- Upload electronic health certificate

2. Arriving at the airport

- Temperature check with thermal cameras
- Vital signs detection for all employees
- Touchless hygiene kit vending machines

3. Check-in

- Touchless vital signs detection for passengers
- Self-service bag drop using touchless bag tags
- Select and pay for extra weight, seat selection etc via mobile pay

4. Security

- Self-scanning for security access validation
- Advanced bag and body screening eliminating the need to remove electronics and liquids
- Satisfaction feedback via automated, anonymised AI sentiment analysis

5. Waiting for departure

- Touchless shopping experience with digital fittings and virtual shopping walls
- Digital menus for food, drinks and services
- Touchless vending machines controlled by app
- Personalised communications and wayfinding using location services

6. Boarding

- Individual boarding notifications and smart queuing
- Touchless boarding using biometrics, self-scanning boarding passes and travel documents

7. Onboard

- Safety card displayed on personal IFE/seat-back/tray table
- IFE screen controlled by own smart device
- Cashless purchases only
- Digital lavatory queue management and automated UV sanitisation after each visit

8. Arrival

- Touchless immigration process using advance information and biometrics
- Vital sign detection for arriving passengers
- Personalised baggage notification via app
- Electronic customs form

the airport and subsequently use automatic visa and passport checks. The company also offers a range of touchless technology solutions for check-in procedures, vital signs detection, bag drop and boarding.

In July, aviation tech specialist SITA announced a global partnership with NEC Corporation to develop a secure walk-through travel experience at airports that will “unlock the potential of seamless next-generation passenger processing solutions, making mobile-enabled and touchless airport processes a reality”.

And in August it launched its most extensive biometric deployment to date, at Beijing Capital International Airport. Its Smart Path solution included the implementation of 600 biometric checkpoints, 250 lanes of automatic gates, 80 kiosks and 30 self-bag drop stations.

Passengers can now “glide through the airport in an entirely touchless experience, using only their face as their boarding pass”.

Barbara Dalibard, CEO of SITA, says: “Resilient and agile systems that increase efficiencies and can respond to unpredictable fluxes in passenger numbers will greatly influence those who can adapt and thrive in

“

Business travel is going to be less frequent, more mindful and more virtual, and we have to accept some changes

this new reality. The pandemic represents a new 9/11 moment for air travel and how we respond will define our industry for decades to come.”

BIOMETRICS BLOSSOM

A key player in this market is Collins Aerospace, which says touchless travel enhancements fall into two categories. Firstly, self-service technologies that are designed to get passengers into and through the airport as quickly as possible, such as check-in kiosks and bag drops. In September, for example, it launched Kiosk Connect, allowing passengers to scan a QR code to complete the check-in process without touching a common kiosk screen.

The other key area involves biometrics, which allows document-free movement through an airport once passengers have enrolled and created a single-token identification – facial scans that replace traditional identification documents and even work while a passenger wears a face mask.

In October, for example, Emirates introduced a ‘biometric path’ at Dubai International Airport that includes a ‘smart tunnel’ for passport control – passengers simply walk through a tunnel and are “cleared” by immigration authorities without human intervention or the need for a physical passport stamp.

“Biometrics is not a new technology. It’s already in use at airports around the world, primarily for immigration and border control,” says Tony Chapman, global product management and strategy, Collins Aerospace. “But when leading-edge biometric technology overlays each airport

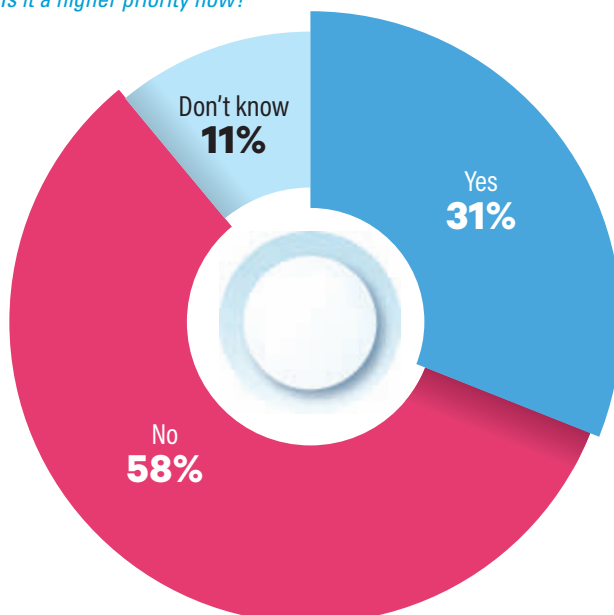
CASH GOES CONTACTLESS

The ongoing Covid-19 pandemic has given rise to a new imperative for hygienic purchasing methods and contactless electronic payments are the most obvious solution to fulfilling that need. Issuer support for mobile wallets continues to expand, as evidenced by Bank of America’s integration of its corporate cards into

Apple Pay and Google Pay. Meanwhile, virtual cards continue to gain traction as well, with expense and payment provider Emburse rolling out a new corporate payment product that emphasises the added bonus of pre-approval capabilities along with V-cards’ convenience and hygienic advantages.

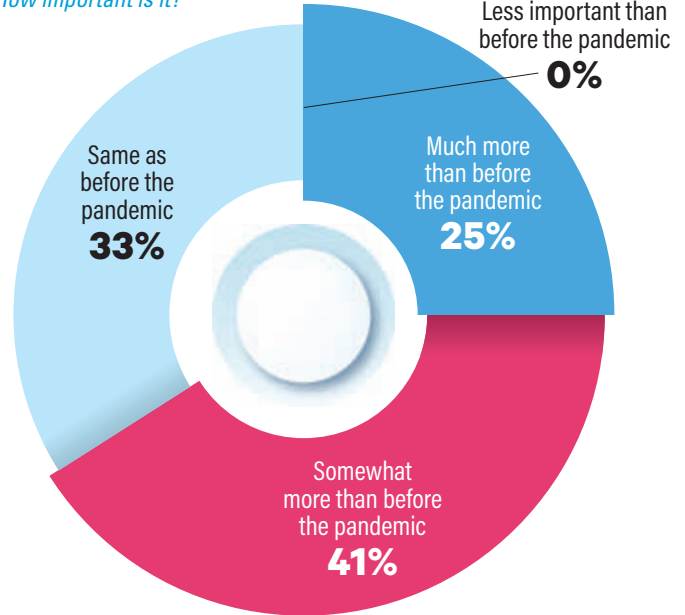
CONTACTLESS PAYMENTS IN TRAVEL

Is it a higher priority now?



INNOVATION & DIGITISATION IN TRAVEL

How important is it?



Source: BTN’s State of the Managed Travel Industry survey conducted in September 2020 and featuring more than 200 responses from travel managers with responsibility for European programmes



touchpoint so that a passenger's face becomes that passenger's identification – instead of a driver's license, passport or boarding pass – all airport touchpoints become part of a single end-to-end biometric journey that is touchless, seamless and faster.”

The company has biometric technology working at McCarran Airport in Las Vegas and for JetBlue at JFK Airport in New York, while biometric trials were conducted with easyJet between Bristol and Dublin earlier this summer. It is also testing thermal imaging and temperature scanning technology. “One could see the advantage of having it at arrivals, before any significant interaction with other passengers, and, again, at security screening, before passengers mix on concourses and before they board their aircraft,” says Chapman.

CORPORATE ADOPTION

Despite the surge in touchless technology, it remains to be seen if corporates will actively lean towards suppliers that are leaders in this field. Anecdotal evidence suggests that many companies are asking airlines questions what they're doing to mitigate the spread of Covid but, on the whole, corporates

are simply suggesting that where there is a choice, travellers should take the touchless option.

“Some of our travellers – people of all ages, including some I thought would miss the human aspect – have welcomed touchless technology. With Marriott, they've been checking in online and getting their room key on their phone and they really like that,” says Hilti's Gibson.

While Hilti does not actively steer travellers towards suppliers that are leading the way in this arena, it does “put the information out there for travellers to be aware of,” says Gibson. “We let them make their own decisions but if I saw a supplier wasn't doing anything [to mitigate the spread of Covid-19] we would direct them away from them. We make sure they have the necessary information and some people will be more comfortable than others with what's in place.”

Midas Travel's Cox, meanwhile, believes we are in a “bedding-in phase” and ultimately there will be a split between travellers using technology wherever possible and those who prefer human interaction. “Touchless travel still has some way to go, but in future there has to be the option for both,” says Cox.

How closely the adoption of touchless technology is related to concerns around Covid-19 – rather than mere personal preference – is hard to tell. However UBS' Cuschieri has noted not only a shift in attitude to technology but also predicts a new approach to travel.

“A lot of travellers didn't like the prospect of all this [touchless technology] before the pandemic because it removes the human interaction,” says Cuschieri. “Some travellers will miss that but I think it is going to become the norm. How we travel in the future is going to be different – it will be less frequent, more mindful and more virtual, and we have to accept some changes.”

TOUCHLESS STAYS

Acceleration of touchless technology has been most visible across airports and airlines, but hotels are innovating too. Mobile check-in or self-check-in kiosks – with the recent addition of UV lighting to help with disinfection – have been available at some hotels for a while, and keyless entry systems – where a guest uses their smartphone to open their hotel room – are set to gain traction.

Marriott says its Mobile Key facility is now offered at around 3,800 properties worldwide and will be live at 60 per cent of its EMEA hotels via its Bonvoy app by the end of the year. Guests can also use the app to check-in, access executive lounges and car parks, engage hotel concierges, and receive notifications when their room is ready.

“As we look ahead, technology will continue

to underpin everything we do and will be an enabler to an enhanced customer experience,” says Arielle Quick, chief continent lodging services officer, EMEA, Marriott International.

A plethora of virtual concierge apps are also now available, and increasingly more elements of guestrooms, such as blinds, room temperature and lighting, can be controlled from apps, avoiding frequent contact with switches and thermostats.

In public areas, food and beverages can be ordered via QR code-enabled menus, and new elevator systems incorporate proximity-touch-activated buttons. Some hotels have also introduced automated, UV light-based room cleaning robots. The desire to invest and innovate in the current environment is only stifled by reduced revenue streams.

The perfect travel companion



We know that travel isn't straightforward these days, which is why at Evolvi we make the online booking of 'no-touch' rail eickets and seat reservations as easy as possible through our dedicated TMC platform and our API.

There's no need to queue to collect paper tickets, no terminal touchscreens to navigate, no jostling for a seat...and with easy access to real-time information, Evolvi is your perfect rail travel companion.

T: 01732 598510
www.evolvi.co.uk

evolvi[®]



ON THE CUSP OF CHANGE

New pricing models, client movement and industry consolidation – there's never a dull moment in the TMC business, writes **Andy Hoskins**

Three notable developments in the TMC market occurred within the space of just a couple of weeks in September and October, each representative of the seismic shifts this sector is currently navigating.

First came the news that CTM is acquiring Travel and Transport in a move that is expected to herald further consolidation within the TMC market. Next was the publication of a white paper from the UK's Business Travel Association addressing the urgent need for new TMC pricing models at a time when transaction fees and supplier revenues have dried up. And, most recently, came confirmation that Google has appointed American Express Global Business Travel as its sole global TMC – a decision that is believed to herald a shift to a more tightly managed travel programme but also shows corporates are not averse to switching TMCs in the midst of the pandemic.

While travel industry suppliers have been hard hit by the downturn in demand for travel and the painfully slow progress in establishing

appropriate Covid testing regimes at airports, TMCs have perhaps suffered most of all. Redundancies are rife, with staff cuts of a third or even up to half not uncommon, and industry experts are, sadly, expecting business failures and consolidation beyond what has already passed.

"The transactional model has been a disaster for TMCs during the Covid-19 crisis. With no transactions to charge for and continuing demand for offline services across a wide variety of criteria, many are facing significant issues in cash liquidity and long-term business funding," says Chris Crowley, partner at consultancy Nina and Pinta. "At this stage it's safe to predict that sadly, a number may not survive and those that do will and already are reshaping their businesses for a new world post-Covid."

In this environment, CTM's \$200 million acquisition of Travel and Transport – due to complete this autumn – might seem a surprise, but CTM had been an admirer for some years. The move gives the Australian TMC a stronger foothold in the US, the chance to deploy its Lightning booking tool with a wider audience, and the benefit of the T&T-owned Radius network too.

T&T had rebuffed CTM's advance for several years but the pandemic ultimately forced the move through. Deborah Potts, director at business growth and mergers and acquisitions specialist Summit Advisory, says the deal was "pretty dramatic" but "makes total strategic sense when you are a highly ambitious business like CTM. Overnight you increase your customer base, buying power and can consolidate costs."

A SHRINKING MARKET

Will we see this sort of activity pick up pace in the current environment? "The short answer is 'yes'," says Potts, who adds that, pre-Covid, "consolidation was already the name of the game, particularly in the UK".

She believes TMC whose profits were already being negatively impacted by Brexit and those struggling to keep up with fast-evolving technology are among those ripe for acquisition. "Plus, I expect the current crisis to bring forward retirement plans for others as owners realise they are facing probably years rather than months for a full recovery, if ever. No matter how strong your cash reserves or 'pension pot' is – as many owners view them – no one likes to see these reserves being diminished."

The UK market has been thinning out for years through mergers and acquisitions, but now it's seeing failures too. Business Travel by STA ceased trading in August following the downfall of parent company STA Travel, while 80-year-old Thornton's Travel collapsed at the end of September. Further market movement would not be unexpected.

"The loss of revenue for those TMCs relying on the transaction model make this sector ripe for more M&As," says Kate Watson, head of consulting at Areka. "I believe more is to come, particularly around the small and medium-sized market where a technology solution or specialist sector knowledge will expand opportunities once we reach some sort of recovery."

Mick Gibbs, chairman and CEO at the Norad Travel Group, says the CTM-T&T deal was "a big message. The TMC market is going to shrink. We might see a lot of fire sales and we might see a lot of sweeping up. It's been a tough time and it'll be interesting to see who picks up what and the look and feel of the new hybrids."

TMCs that rely heavily on online business and had no real consultancy based value are vulnerable, Gibbs believes: "the stack is high, flog it quick online TMCs. That market has been decimated because the trust factor has gone. When something goes wrong and there's no human back-up... I think the trust has been broken and price falls below the customer's priority list."

He continues: "If as a business you have not set aside funds to run for at least 12-18 months then you've got a very shallow business. Well-managed TMCs should be able to ride this out, but there's been nothing like this before and even some of the best are struggling."

The TMC, which has had to make staff cuts of its own



“

Well-managed TMCs should be able to ride this out, but there's been nothing like this before and even some of the best are struggling

CASE STUDY: THE SUBSCRIPTION MODEL

Simon Potter, group procurement officer at Inchcape Shipping Services, commenced a TMC RFP late last year and after an exhaustive process awarded the business, on a subscription-based model, to Blue Cube Travel during the pandemic this summer.

"There were other big players in the mix but Blue Cube was the only TMC who offered the subscription fee model. It's something new to us but it puts the buyer in the driving seat. It's a one-off cost and it's transparent" says Potter.

"We also see very clearly the position TMCs are in now and why it works for them." The fee can be paid monthly, quarterly or annually, depending on client preference, says the TMC.

"With the transaction model we have sometimes struggled to get buy-in from our travellers. Take low-cost travel, for example, where a TMC fee can really bump up the cost of a cheap ticket that our travellers see elsewhere. Being able to remove that argument is a strong tool to help drive buy-in. We think this model is going to make compliance to travel policy much more straightforward. I've been looking for that lever," Potter explains.

"The subscription fee means you pay once upfront and I can go to my stakeholders and

tell them what their costs will be for the year. We know our costs beforehand and we still get those service levels and the offline support that we need."

Bex Deadman, managing director of Blue Cube, says the agreed subscription fee was based on the client's 2019 travel volumes but has been reviewed and amended accordingly.

"Launching mid-pandemic has not been straightforward. We're working with some interesting hybrid ideas at the moment, but the theory behind the model is that it's scalable up and down with some caveats."

She continues: "The important part to understand is that it's less about the travel transactions and more about the value proposition. Simon sees our position because we've been fully transparent about what we do beyond the booking."

Potter adds: "It's been a leap of faith for us to go down this route. There are few TMCs to have made this jump and I think it's essential they all consider whether to go down it or not. There's a certain element of commercial risk for a TMC as the subscription fee we pay is less than what the transaction fees would be in normal times, which is also a driving factor for me."

– “redundancies are just the hardest thing” – says its corporate travel business was back to around 22-23 per cent of 2019 levels in mid-October. “If we can get to 40 to 70 per cent by the end of 2021 we’ll have done a good job, but this will rely on effective global procedures and confidence restored back among travellers,” says Gibbs.

Garry Lloyd, sales director at Wayte Travel Management, a fellow Advantage and Focus Travel Partnership member, adds: “It’s tough but it’s tough for everybody right now. We’ve made cuts and had to make changes but we’re blessed with a good number of long-standing clients.”

The TMC was on course for a tenth consecutive year of growth before the pandemic hit, but Lloyd believes Wayte’s business model, offering only offline service, has stood it in good stead. “When the pandemic hit, we were one of the best placed agencies to service the changes people needed in those early days. The online model struggled and people found they had to go offline.”

Nevertheless, he fears for the wider industry. “We have so many talented people that we’re at risk of losing and I’m sure more TMCs will fall by the wayside. Thankfully, we’re in a good position. We’re independently owned and we’ve always been prudent over the years and we’ve stored up during the good times.”

MONEY MATTERS

TMCs’ dependence on clients’ transaction fees and supplier revenues has exposed this sector in the harshest possible way since Covid-19 swept across the globe.

“In the past, TMCs have relied on supplier commissions as well as the client’s transaction fees but it’s all out of the window now because there’s so little business. Suppliers have been supporting the TMC cost structure to the benefit of the corporate customer,” says Crowley.

After months of industry talk about new pricing models, the BTA has published a white paper assessing the pros and cons of different commercial set ups – transaction fees, subscription fees and management fees – and the idea of provoking wider debate (see panel, right).

“The purpose of this is completely agnostic. It is not our role to choose [the best model], it is to have the debate,” says BTA chief executive Clive Wratten. “For our industry to evolve, especially in these challenging times, there needs to be an open, honest and constructive dialogue between all of the key stakeholders, and that is what the BTA is seeking to achieve in the weeks ahead.”

One advocate of the subscription model being widely championed by TMCs is Blue Cube Travel which was already on the case before the onset of the pandemic.

“We’ve been working on this for a couple of years,” says the TMC’s managing director, Bex Deadman. “The tech-based TMCs have been working with this [for a while], but as a traditional TMC our services have changed a lot in recent years. We do so much more than booking travel – it’s about duty of care, data, analytics... If you’re a



“

If as a TMC you’ve diversified the services you offer, the subscription model can really work

transaction-based TMC you’ll struggle with a subscription model but if you’ve diversified the services you offer and you see the whole trip then the model can really work.”

Deadman says the subscription fee can be paid monthly, quarterly or annually and could be based on user numbers, modules or the particular services or tools a client requires. She concedes now is not a great time to sell the idea to customers but believes it is the future for many TMCs and corporates. “We’re not going to be forcing anyone to move across to this model but we’re giving them the option. Our entire approach is about laying it all out, all the things available, and asking the client what works best for them. Hybrid models are also an option.”

Crowley sees a subscription fee working particularly well around technology offerings. “A TMC might say

TIME FOR CHANGE?

The Business Travel Association (BTA) sets out the pros and cons of future TMC pricing models

Transaction fees, the dominant model in the sector currently, are “little liked” by TMCs because of the huge amount of work that goes on behind the scenes around a booking. And in the unlikely event that travel grinds to a halt, as it has during the pandemic, revenues dry up too. Corporates tend to favour transaction fees, however, because they ensure costs are allocated directly to budget centres and largely avoids the need for central costs.

A subscription model would ensure TMCs get paid for the services they provide but many corporates do not have centralised budgets. Another approach might be to charge subscription fees per traveller, with different levels applicable to regular travellers than to those who take occasional trips. The question for many corporates is will it cost the same as the current model or will it prove more complicated and costly.

Management fees, where corporates are charged for the services TMCs provide at cost with a fair profit built on top, is simple in concept but can be difficult to manage in practice. Done correctly, it can ensure that the TMC’s goals are aligned with their corporate client’s. Again, the lack of centralised budgets may prove to be a stumbling block.

The report also says TMC revenues pre-Covid were comprised roughly of one-third clients’ fees and two-thirds from supplier income. “Corporates have been aware that the supplier revenue was based on some form of preferencing and bias selling and this has historically created some tension in their TMC relationships,” notes the BTA.

'download our all-singing, all-dancing app for every user at, say, \$10 per user per month'. Anything they do there is free of any kind of fee but any revenue earned on it is kept by the TMC. But if you pick up the phone and ring them, that will cost you. I could see that becoming quite common as it provides some level of predictability."

But for all the talk of subscription fees, Crowley says "lots of TMCs are still cheerfully quoting transaction fee models and buyers are still asking for them."

Norad's Gibbs says his TMC has been offering a version of a subscription model for years. "Our clients pay us monthly in advance for certain things. None of them stopped doing this [during the pandemic] so we've always had some [revenue] coming though. It's given us good protection during this time. We've still been hit, of course, because we're not getting the [transaction] fee."

ON THE MOVE

Gibbs says the TMC has taken on "a couple" of new clients since the start of the pandemic and has also seen "one or two" go out to market. "There's a lot of people with some time on their hands now, but if you go out to RFP without knowing what things look like going forward, how can you put something down that is going to be sustainable for a long-term partnership? There are too many unknowns."

Nevertheless, client movement has continued at perhaps a greater rate than some expected during the pandemic, although many of the recent headline-grabbing wins will have been long in the making.

"It's a challenging time for TMCs to respond to a corporate RFP [with reduced staff numbers] and whilst many corporates will roll over current agreements until travel volumes return, others are keen to move forward," says Areka's Watson. This could be due to contractual reviews but also down to internal pressure on travel teams to show value and reduce costs, looking at all external contracts while travel volumes are low.

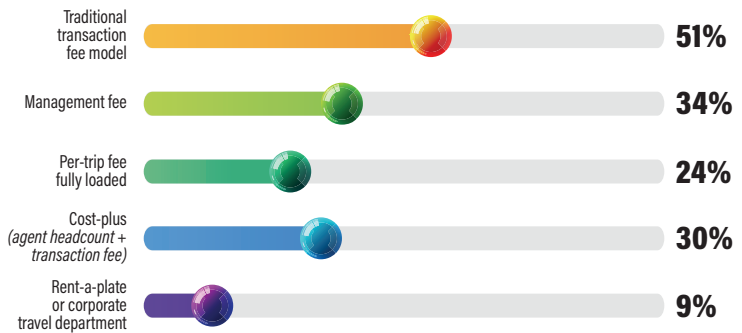
Tony McGetrick, VP and director of sales and marketing, UK & Ireland at BCD Travel, which recently landed the US Army account, says he has been surprised by the number of bids and activity this year which are "more than expected, and still they come". He believes 2021 will be a "major bidding year" with a significant number of large corporates going to RFP or at least going to review.

Recent movement would appear to substantiate his prediction. Amex GBT recently confirmed it has picked up the business of Google, PayPal and Eli Lilly and Company this summer alone – companies ranked fourth, 96th and 99th in BTN's Corporate Travel 100 ranking of North America's biggest business travel spenders.

Prudent travel managers currently surveying the market are doing their due diligence, says Dave Bishop, chief commercial officer at Gray Dawes. "We're being asked now in RFPs about our resilience as a TMC," he says, before pointing out that TMCs are also assessing

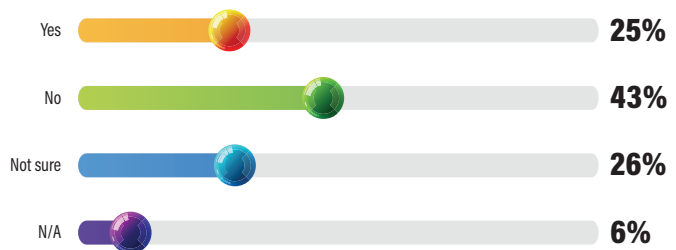
TMC COMMERCIAL MODELS

Travel managers' preferences (more than one choice possible)



TMC FEES IN 2021

Do buyers expect to pay more to account for new complexities?



Source: BTN's State of the Managed Travel Industry survey conducted in September 2020 and featuring more than 200 responses from travel managers with responsibility for European programmes

“

We're being asked now in RFPs about our resilience as a TMC. The whole supply chain is at stress

their only supply chain. "No one is immune from this. The whole supply chain is at stress here."

One travel manager, who wishes to remain anonymous, said their TMC contract expires in spring 2021 and "we'll start having conversations soon, but I'm not sure if it's the right time to change TMCs and go to a full RFP. You want to be supportive but there's a balancing act... do you support the industry, your TMC, or do you just do what's best for you?"

"You also don't know who's going to be around in the spring. You can't ask 'are you on the brink?' but you do need to look at how secure they are. Suppliers too – TMCs rely on them for income as well as their customers."

The travel manager's TMC has already suggested they could extend their existing transaction fee arrangement, but would they consider a subscription fee model? "You'd need to know exactly what you're getting. It makes sense for the TMC but they would really need to prove their worth – more so than when they work on transaction fees."

For many corporates and TMCs discussing new deals, remuneration is the sticking point, says Crowley. "The RFP pace has been quite good, but not everyone's reaching a conclusion as pricing is an issue – corporates just can't commit to volumes right now." Like so many areas of corporate travel, progress is being stymied by uncertainty and an industry facing its biggest challenge to date.

Worried about the future of travel?

Scan to find the plan!



BCD•travel



UP IN THE AIR

With no meaningful 2020 data and huge questions marks over the recovery of business travel, **Amon Cohen** considers how best to get airline deals in place for 2021

Nearly eight months on from companies across Europe switching off their business travel taps, many corporate airline agreements have expired or reached their review deadlines. But with little data for most of 2020, and no idea what 2021 looks like, where do you even start with a negotiation?

The answer, it would appear, is you don't. Status quo is emerging by consensus as the best of a bad bunch of options. "Almost all airlines are accepting extending agreements negotiated before the crisis started for another 12 months," says Jörg Martin, principal of CTC Corporate Travel

Consulting in Germany. "Volumes from corporate clients have decreased but airlines can't offer the service and flexibility that was part of their original offer." In any case, Martin points out, airlines have little bandwidth to renegotiate because their sales staff are furloughed, on short-time working or redundant.

From the buyer's perspective, says a European travel manager, speaking on condition of anonymity, "many organisations are taking the view this is not the time to take advantage of other companies' misfortune. No one I know is saying 'you need my business and I want a better deal.'" More important than price at this point, the travel manager believes, is agreeing more flexibility

with airlines about terms and conditions – allowing name changes on vouchers, for example.

A potential alternative buying strategy could be to avoid corporate fares from preferred suppliers for the time being and instead book best on the day from any airline. This tactic could be backed up by using an automated fare assurance tool that rebooks at a lower fare if one becomes available.

However a travel manager for a global professional services firm, also speaking anonymously, rejects this approach, both in principle and practice. First, he says, “I believe in supporting your preferred airlines. You need each other.” Second, he doesn’t consider this the ideal moment for air rebooking tools. “People travelling for business really care about their seat assignments right now, so they can be first off the plane for example,” he says. “If that gets lost in the rebooking, it adds to their stress. With such low volumes as most companies have at the moment, price isn’t the major factor here.”

Even so, there are some price risks which merit attention by travel buyers. During a recent *BTN Europe* Week in Review podcast, EY global head of travel, meetings and events Karen Hutchings said domestic fares are down but international fares are up owing to reduced capacity. Consequently, “there has to be consideration of whether you negotiate more fixed fares so you’ve got a ceiling with your airlines?” Hutchings said. “You need some protection around the increase in fares.”

Martin believes basic economics dictate buyers will have to accept higher fares as travel resumes “because volumes are lower. Airlines’ non-flexible costs have to be divided among fewer tickets.” Another factor likely to drive fare inflation is reduced competition. “I expect



“

Airlines will have to shrink their networks to focus on fewer routes in the future

bankruptcies,” Martin says. “I can’t imagine all airlines will survive the next 12-18 months and those still around will shrink their networks to focus on fewer routes. It will affect the purchasing power of corporate clients.”

Changes to internal demand could also drive up average ticket price paid. The many uncertainties around travel in the Covid age, such as whether a quarantine might be required, are reducing the number of days travellers book flights before departure, and tickets bought at short notice are generally dearer. “If your agreement is heavily focused on advance purchase fares, maybe you should look at short-notice fare classes too,” said the professional services firm travel manager.

Buyers need to consider other risk factors too. One is medical: are preferred carriers taking adequate steps to protect passengers from infection? An issue troubling the the professional services firm’s travel manager is inconsistency in hygiene protocols between different partners in airline joint-ventures. He cites it as a particular worry because reduced route networks might mean travellers will be more likely in future to fly indirectly, using two or more joint-venture partners to reach their destination.

Although the connection may not seem obvious at first, the same travel manager also points to duty of care challenges with some airlines removing fares from global distribution systems and making them available only through New Distribution Capability channels. His view is that keeping all bookings coordinated through GDSs is essential for keeping tabs on which employees

2021 AIRFARES EXPECTATIONS

BTN’s State of the Managed Travel Industry survey, conducted in September, revealed mixed expectations of airfares in 2021. Of the 206 travel managers responsible for European travel programmes, 37 per cent expect airfares to rise next year, 23 per cent believe they will stay the same, and 30 per cent think they will decrease, with the remaining 10 per cent unsure. Meanwhile, 43 per cent expect to negotiate dynamic rates with airline partners in the year ahead, 41 per cent will pursue scaled volume discounts and 17 per cent will seek fixed rates – respondents could choose more than one model.





are supposed to be where. “What I don’t want are NDC-only fares. Don’t do it right now please,” he says. “Stop undermining the corporate channel.”

While buyers certainly have to address employee health, they have to consider supplier health too. The International Air Transport Association projects airlines will burn \$77 billion of cash in the second half of 2020 and possibly another \$5 billion-\$6 billion per month in 2021. How can buyers figure out which suppliers will survive this unprecedented ordeal? “Most industry followers know which airlines are under pressure,” says the professional services firm’s travel manager. “If you’re not sure, talk to your TMC’s consulting business. Don’t get caught up in what the general media say.”

More than other suppliers, potential failure of airlines is a particularly onerous financial risk for buyers because many tickets are paid for at time of booking, not when they are actually used. Jörg Martin considers this a practice which needs to end. “It’s old-fashioned and almost unique to the travel industry,” he says. “The risk of airlines failing between when you buy and fly is huge.”

Martin believes now is the ideal moment for a reset because few passengers are flying and many airlines are receiving state aid. Consequently, temporarily switching off cashflow from booked but unflown reservations would be insignificant. He chairs the aviation committee of the German travel managers’ association VDR, which is lobbying the German government for change. “The government is really keen on the idea and asking lots of questions,” he says. It’s a rare example of how the present crisis may generate some positive outcomes.



EUROPEAN AIRLINE SNAPSHOT – SEPTEMBER

357,225

TOTAL SCHEDULED FLIGHTS

-9.99%

MONTH OVER MONTH CHANGE

202,608

TOTAL INTERNATIONAL FLIGHTS

154,617

TOTAL DOMESTIC FLIGHTS

5,204

AIRCRAFT IN SERVICE

2,487

AIRCRAFT IN STORAGE



FLIGHTS COMPARED TO SEPTEMBER 2019

Asia-Pacific

70.2%

Global

54.9%

North America

51.7%

Europe

45.9%

Middle East & Africa

43.3%

Latin America

41.8%

Source: Cirium's Airline Insights Report, September 2020



Skytrax 5-Star Airline
13 consecutive years
(2007 - Present)



ASIANA 350

To Seoul and beyond

*Experience brand new features on Asiana A350
with certified 5-star airline ratings on Skytrax for 13 consecutive years.*



Economy Smartium

£120 (London-Seoul/One way)
Extra Leg room & Priority Boarding



Inflight WIFI & Roaming Service



Full LED Mood Lighting



Comfortable Cabin

[improved circulation/pressure/humidity]



More space for Economy Seats



195 Cm relaxing full flat beds in Business

TRANSITION TIME

Covid-19 might have overshadowed the UK's first months following its departure from the EU, but the end of the transition period is now drawing near. **Andy Hoskins** considers what's in store for travel



Brexit: remember that? It was not long ago that this particularly polarising issue dominated UK society and nothing could possibly supplant it. How times change.

But with the UK having left the European Union on 31 January this year, and the transition period coming to an end on 31 December, you might recently have noticed the UK government ramping up its 'Check, change, go' awareness campaign to help individuals and businesses make the necessary preparations. The only problem is, at the time of writing in late October, there still remains much to be clarified – most notably what kind of trade deal the UK secures. As *The Guardian* recently reported, there's a sense among some European

ministers and officials that Prime Minister Boris Johnson is stalling for time and will make a judgement following the result of the US election. Former UK representative to Brussels Ivan Rogers believes Johnson will go ahead with a no-deal approach should Donald Trump triumph over Joe Biden in the belief that a significant trade deal with the US could be struck should the incumbent president retain his position.

Thus, when addressing the ABTA Travel Convention in mid-October, secretary of state for transport Grant Shapps could only offer an insight as to what might occur: "For road and aviation both sides [the UK and EU] are in broad agreement that operators from the UK and EU should have rights to provide services between the UK and EU and that will be the

basis of agreement. Of course it's critical that flights between the UK and the EU can continue to operate as normal at the end of the transition period regardless of the outcome of these negotiations and that's why we expect the EU to bring forward contingency measures as they've done so before to ensure flights will continue if negotiations are unsuccessful [and] of course we would look to reciprocate that."

In the meantime, there are mixed visions of what might unfold at the UK's airports and ports on 1 January 2021. Although few dramatic changes to international travel regulations are expected, changes to passport requirements might catch a few people out (see panel, p42) and corporates should also keep track of entry requirements for each EU member nation.

"Visa-free travel is expected to continue for specific activities such as meetings with clients, customers and colleagues and, when the pandemic subsides, for attending conferences and exhibitions relating to trade and industry," says Nick Parkinson, an associate at Travlaw, a specialist law firm for the travel industry.

He continues: "Even where a visa is not required, the traveller will need to consider what other documents may be required and also be prepared for a 'gentle interrogation' at the border. Passport expiry dates, proof of accommodation, purpose of visit and proof of finances all need to be considered."

CORPORATE PREPARATIONS

For many UK companies, the planning for Brexit started several years ago and has more recently been placed on hold following the outbreak of the Covid-19 pandemic. One of the biggest concerns has been ensuring employees from EU member nations have secured their right to stay and work in the UK. Travel has not been a major feature of these conversations.

"We have a Brexit taskforce but it hasn't really looked at business travel at all," says one travel manager.



“

Visa-free travel is expected to continue for specific activities such as meetings with clients and colleagues and, when the pandemic subsides, for attending conferences and exhibitions

Another travel buyer adds: "We have had a dedicated immigration team working for over two years supporting our staff to ensure any requirements post-Brexit are met and all costs are covered by the company. Beyond that we are monitoring government advice and we will pivot accordingly."

Ana Gibson, travel manager at Hilti, is not alone among corporates in that, for her company, "Covid has just taken over everything and travel-related preparations have been put on the backburner a bit."

The company has many European nationals working in the UK and some UK citizens on secondments in Europe. It has a Brexit taskforce in place and a Brexit hub – a dedicated area on its intranet providing relevant



information around Brexit to its employees. In normal circumstances, the company's key routes from the UK include Manchester to Germany and Austria (for onward travel to its head office in Lichtenstein) and also to Sweden, Denmark, Finland and Ireland.

Gibson says: "We're ordering in extra stock from overseas – although that doesn't affect travel – as it looks like we're heading for a hard Brexit but we don't really know what that entails at the moment."

She says conversations with her TMC about Brexit have not occurred in recent months because "they know we've barely been travelling so it doesn't matter too much at the moment. It's not a key thing on my desk, but if I was looking for assistance they'd help."

Gibson adds: "Because we're not doing much [travel] at the moment it's taken the pressure off, plus there's very little information out there right now. We don't expect travel to really start until next year once we're all office-based again."

With Covid-19 continuing to stifle demand for travel the impact of Brexit at ports and airports on 1 January – if any – will at least be lessened.

"No one thought Brexit would be a welcome change of subject," says Abby Penston, chief executive of the Focus Travel Partnership. "It's definitely been overshadowed by Covid, but it's coming back now and unfortunately the two things marry together in that they're both barriers to travel."

NEED TO KNOW

UK passport holders

- On the day of departure, the passport must have at least six months remaining on it and be less than 10 years old (even if it has six months or more left).
- The rule do not apply to travel to Ireland.
- The rules apply to passports issued by the UK, Gibraltar, Guernsey, the Isle of Man and Jersey.
- At borders, UK citizens may need to show a return or onward ticket, show they have enough money for their stay and, possibly, use separate lanes to EU, EEA and Swiss citizens.

EU passport holders

- Passports will be required for entry into the UK from October 2021 as the government phases out the use of EU, EEA and Swiss national identity cards as a valid travel document for entry to the UK.
- Irish citizens will continue to be able to enter and live in the UK as they do now.

Healthcare

- European Health Insurance Cards (EHIC), which entitle holders to reduced cost or free healthcare within the EU, are valid until 31 December. After that time, they will no longer be valid for most UK citizens.
- Although most businesses will already have travel insurance in place for employees, it will be even more pertinent for travel in the EU from 1 January 2021.

Visas

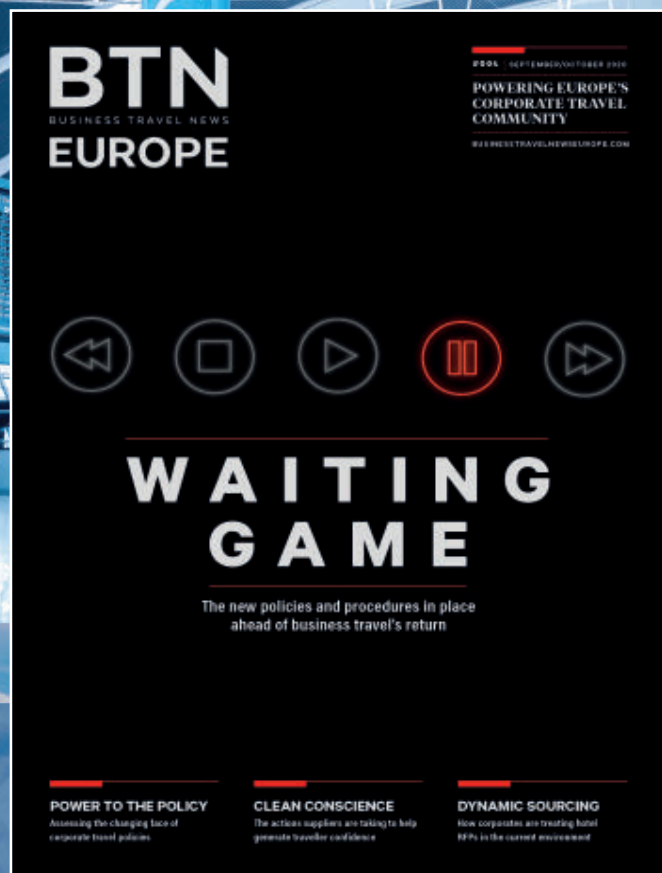
- UK passport holders will not need a visa for short trips to EU countries according to European Commission proposals.
- Leisure travellers can stay for up to 90 days in any 180-day period.
- Visitors may need a visa or permit to stay for longer, to work or study, or for business travel. Business travel includes activities such as travelling for meetings and conferences, providing services (even with a charity), and touring art or music, according to the government.
- Travel to Ireland is unaffected.

Mobile roaming

- From 1 January 2021, the guarantee of free mobile phone roaming throughout the EU, Iceland, Liechtenstein and Norway will end for UK citizens. However, all the UK's major mobile network operators say they have no plans to introduce roaming charges for phone use in the EU.

Details subject to change. Visit gov.uk/transition for the latest information

SUBSCRIBE TODAY - IT'S FREE!



BUSINESS TRAVEL NEWS EUROPE

is the leading source of information, news, features, data, and research for qualified corporate travel managers and travel management professionals. BTN Europe is published six-times annually and has a UK and EMEA circulation of 17,000 individuals like you, who set travel and meetings policy and purchase or manage business travel and meetings on behalf of their organisations.

BusinessTravelNewsEurope.com is your go-to information hub and resource centre for the latest industry trends and updates, and the twice-weekly BTN Europe eNewsletter delivers this content right to your inbox.

businesstravelnewseurope.com/subscribe

PRESENTED BY

BTNGROUP

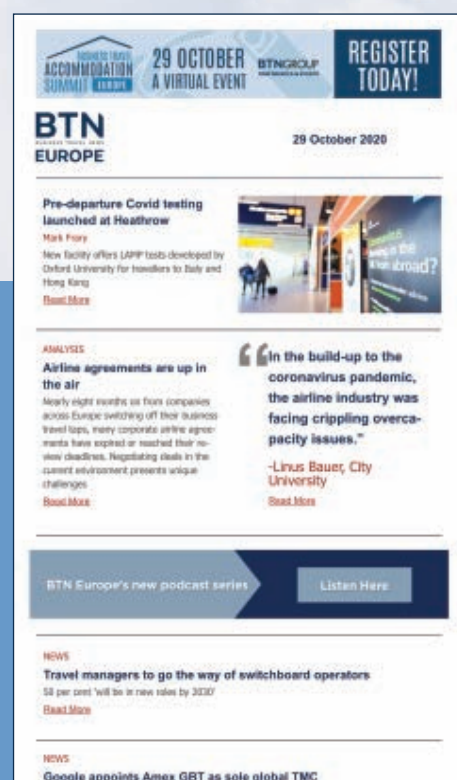
PUBLISHERS OF

BTN
BUSINESS TRAVEL NEWS

TravelProcurement

The Beat

BTN
BUSINESS TRAVEL NEWS
EUROPE



ANOTHER LEVEL



Covid-19 has catapulted duty of care to the top of travel buyers' priority list, but how can you manage it effectively in such uncertain times, asks **Rob Gill**

Duty of care has been steadily rising up the list of priorities for travel buyers in recent years, but this has now transformed into a laser-like focus because of the Covid-19 crisis.

This is particularly true of corporates who have had to continue essential travel during the pandemic with all of the many potential difficulties this involves – employees becoming sick while on the road, getting stuck overseas because of a sudden border closure, or unexpectedly facing up to 14 days' quarantine when they get home.

Even those companies and organisations currently doing little or no travel will at some point in the coming months have to tentatively resume some level of travel at a time when Covid is unlikely to have completely disappeared.

As the security chief for a major global financial institution notes: "Nothing is routine anymore. Every journey is unique and dynamic. Normally we're just involved in high-risk travel but now security approves every form of travel."

The importance of looking after employees is also emphasised in a CWT poll of 150 clients which found that 77 per cent are running employee wellness initiatives while 79 per cent plan to let them decide their travel plans.

"Duty of care has become top of mind for HR and travel teams," says Belinda Hindmarsh, CWT's vice president – global sales effectiveness. "Traveller wellbeing and duty of care were rated by travel managers as the most important components of their programmes."

WORKING TOGETHER

So how are those firms who are currently travelling trying to ensure duty of care for those employees who have to travel in such unprecedented and confusing times?

One of the few positive trends to emerge out of the crisis is how many organisations' various departments – travel, human resources, security, health and safety etc – are now working more closely together on strategies to keep employees as safe as possible.

A global pharma company, for example, has set up an incident management team comprised of travel, security, health and safety, and its chief medical officer.

"It is acting as an advisory body to the senior executive team looking at key questions: What's essential travel? Should travel restrictions continue? Should the senior executive team approve all business travel?" explains the firm's global travel manager.

"We have separated domestic and international travel. If it's international, it goes to our senior executive team for approval. For domestic, it goes to the most senior person at that level."

International travel is certainly seen as being more risky than domestic trips for pretty much everybody in business travel at the moment – with senior management currently having to approve overseas trips at the majority of organisations.

The collaborative approach is also being seen in the SME market, says Corporate Traveller's head of account management, James McIlvenna.

"We are seeing a greater emphasis on HR, security and travel working together," he says. "Now it's even more integral than ever to ensure that there is internal harmony between these departments. We have looked at assisting our clients in creating travel boards or committees to ensure these frameworks are in place."

PREPARING FOR RESTART

There are mixed reports about how keen business travellers are to get back on the road. Some are undoubtedly champing at the bit to see their clients face-to-face for the first time in months. But others will be understandably nervous about the prospect, particularly those with underlying health issues or that have family members in a similar medical position.

One thing that comes over fairly unanimously from organisations is that they have no intention of pressurising employees into taking trips if they are reluctant or anxious about doing so. As one buyer put it: "Nobody is being forced to travel. If the employee is not comfortable, they are not expected to travel."

Kate Watson, head of consulting at Areka, adds: "I've not heard of any corporates putting pressure on employees and, if anything, they are encouraging them not to travel or in extreme cases halting travel altogether."

Duty of care could currently be regarded a moot point for the many organisations with a complete travel ban. But there will come a time when companies will have to start travelling again – whether that's early in 2021 or even months later.

Chris Pouney of GoldSpring Consulting says things could become more difficult for buyers when there is



“

We are seeing a greater emphasis on HR, security and travel working together. It's more important than ever that there is internal harmony between these departments

INSURANCE: CLARITY OR CONFUSION?

Travel insurance has traditionally fallen outside the remit of travel buyers, with HR, legal or finance departments taking responsibility for this area within many organisations.

But the unprecedented nature of the pandemic means insurance is a very live issue for organisations as they look to restart business travel and need to know if their current policies will offer the kind of cover they need for their travellers.

The phrase "the devil is in the detail" has never been more apt when looking at policies, particularly with many suppliers adding more inclusions and exclusions.

Bruce McIndoe, founder and senior advisor of security specialist WorldAware, says: "Many clients have been working with their insurance brokers to clarify and amend their business travel accident and health policies to ensure they are covered in the event of a Covid-19 health issue."

"Many of the larger insurers cover Covid-19 related illness. However, you need to review the specific language in any policy for any insurer."

Travel management company CWT notes that some insurance providers are "no longer covering events arising from the Covid-19 outbreak, such as flight cancellations and medical assistance for policies issued after a certain date".

The insurance issue is also vexing many SMEs who may have previously relied on standard travel insurance policies for their employees.

James McIlvenna, head of account management at SME specialist Corporate Traveller UK, says: "A lot of companies are struggling to understand what exactly is and isn't covered in policies. We recently held a client advisory board meeting where insurance was one of the key areas that senior executives wanted more clarity on from their providers."



“a half-way house” period with the resumption of some travel while Covid is still a major risk.

“You don’t want people to get stuck – that’s a nightmare. It’s one thing getting sick, but you don’t want to get stuck,” adds Pouney. “You could be facing an incredibly expensive medical repatriation on a private jet.”

The understandable nervousness of travellers who are going on trips during the pandemic can be seen by the increase in calls to security assistance providers before they travel.

Peter Jenkins, managing director of Northern Europe at security firm International SOS, said at a recent ITM event: “The appetite for travel is there but we’re seeing a lot more travellers calling in themselves. They’re looking to be reassured and get comfortable with the situation they are facing.”

Jenkins also warned that “access to routine healthcare is significantly disrupted, even in developed countries” – illustrating one of the major factors that could affect decisions about whether to travel during the pandemic.

WILLINGNESS TO TRAVEL

One of the biggest duty of care challenges may be identifying potentially vulnerable travellers who may not want to reveal any underlying medical conditions. In most European countries they would be protected by privacy laws from having to disclose this personal information to their employers.

“

Access to routine healthcare is significantly disrupted, even in developed countries

Jafles Pancheco, chair of the GBTA Europe Risk Committee, admits this is a “woolly area” which presents difficulties to corporates looking to resume travel or even return to their offices.

“Data privacy prevents corporates having access to this information and they are therefore unable to dictate a set of rules or policies to fit the organisation,” says Pancheco. “Corporate communications can then be a little ambiguous as it has to be the employee’s personal decision based on their own preference and health issues.”

GoldSpring’s Pouney says he has heard of some companies using “employee attestation processes” as a way of confirming there’s no reason why they should not be travelling, so they don’t have to discuss medical conditions with their employer.

Holly Warner, director, travel programme management, global business consulting at American Express Global Business Travel, adds: “It makes sense that individuals themselves make these important decisions about their willingness to travel. Many companies now require explicit approval to travel, often combined with a questionnaire or acknowledgement of health and wellbeing for the employee to complete.

“In our experience, corporates generally advise that travel decisions should be left to the individual and manager to discuss and employees should not travel if they are not comfortable doing so.”

CLEAR COMMUNICATIONS

With the corporate travel industry facing this ongoing crisis, the ability to communicate effectively to employees has become paramount, especially for those who need to travel during what looks like a “second wave” of the virus this winter.

Jo Lloyd, partner at consultancy Nina & Pinta, says: “Corporations are really looking to provide as much information as possible as it relates to travellers who need to travel. How they are doing this ranges from company to company but they are all aiming to make the information accessible and easy to find.”

Inevitably, given the impact of the pandemic, most of this communication is being carried out online, with many employees still working from home after efforts to encourage the reopening of offices had to be largely abandoned due to rising infections rates across Europe.

Online communities for travellers have come into their own during the pandemic with chat and message functions helping to offer updated travel information and reassurance to travellers and other employees.

“Clients are sharing their travel experiences on internal corporate communication mediums such as blogs and on company intranets. They are sharing best practices and stories of travel in Covid times,” says CWT’s Hindmarsh.

Getting the latest information on a range of Covid-related issues is also no easy task with constantly changing quarantine requirements, the need to provide a negative Covid test certificate on entry to some countries, as well as what kind of personal protective equipment (PPE) a traveller may need to take with them.

One leading pharma company has been using its intranet to create a platform for all the latest travel information, with the aim of offering employees “a single source of truth” rather than them having to trawl multiple consumer-facing sites or platforms.

“You need flexibility. Information is changing very rapidly and you need to manage that,” advises the company’s travel manager.

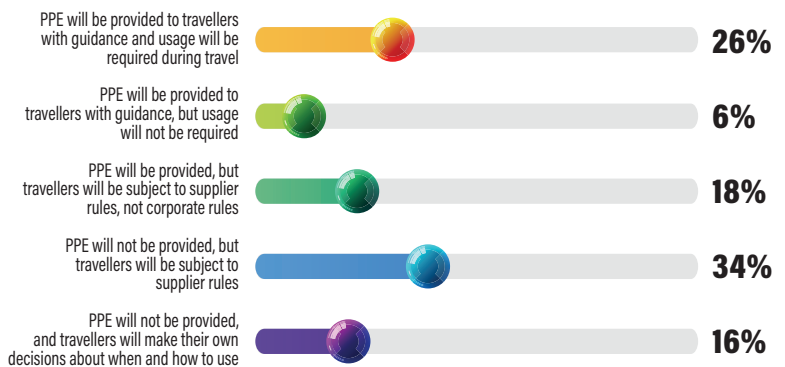
The need for reliable information also seems to be pushing SMEs in the direction of TMCs and third-party security firms as they look to increase their duty of care capabilities beyond simply relying on traditional travel insurance that may no longer be fit-for-purpose in the pandemic era (see panel, p45).

Even for domestic business travel, which is picking up much more quickly than international trips, there are duty of care issues to consider, particularly around hygiene at hotels.

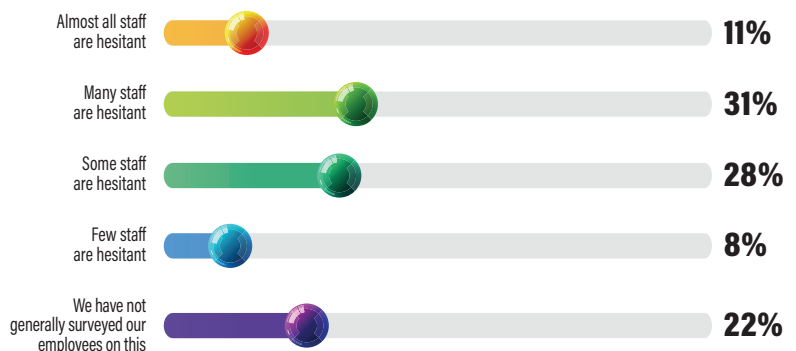
Maggie Monteith, UK client services director at Traveleads, says: “We’re encouraging partners to book



PROVISION AND POLICY FOR PPE



STAFF ATTITUDES TO TRAVEL



Source: BTN’s State of the Managed Travel Industry survey conducted in September 2020 and featuring more than 200 responses from travel managers with responsibility for European programmes

“

Clients are sharing their travel experiences on mediums such as blogs and company intranets

hotels through our travel consultants as it’s of utmost importance that we’re on top of accommodation Covid policies.

“It’s understandably a very fluid situation and while hygiene policies at hotels have been extremely stringent since reopening – and are likely to remain so for a long time to come – this way we can provide added peace of mind to travellers so they can feel prepared for different check-in processes or temperature checks.”

Meeting the challenges of managing duty of care will be crucial to a successful resumption of business travel in the coming months. But it’s a chance for buyers to show their mettle, flexibility and value to their employers, as well as helping to shape how the travel programme emerges from the Covid period.

Hygiene first

Hotels and airlines are making a fresh bid for customers



BY JENNIFER BAKER

Travel in the post-pandemic world has taken a hit. As wonderful as virtual working solutions are, face-to-face business cannot be permanently put on hold. However the reality is sinking in that things will not go back to exactly the way they were. It seems unlikely a vaccine will be widely available before next year and some airlines and travel agencies may never recover.

With all that said, how do travellers plan to manage their unavoidable work trips? The answer in a nutshell is: hygiene. The *Washington Post* recently ran a story on how to clean your hotel room during coronavirus, while the *Independent* explained how to disinfect your plane seat yourself!

According to a new report by the European Centre for Disease Prevention and Control (ECDC), the risk of catching Covid on a flight is low unless you are seated beside an infected passenger. During the flight, fresh air drawn in from the outside is considered sterile as there are few microorganisms at high altitude. For planes that recirculate air, they do so through filters similar to those used in surgical environments, likewise reducing the risk of catching the virus.

And according to a new study by Boeing and the University of Arizona, the cleaning procedure carried out in the cabin between flights is also effective for killing the virus. Boeing uses a new state-of-the-art UV wand especially designed to combat the pandemic.

Korean Air and Qantas are using high-grade disinfectants – MD-125 and Viraclean respectively – to disinfect its planes. Qantas is also removing headrests, pillow covers and blankets to reduce the chance of the virus remaining undetected on surfaces.

Hotels too are keen to stress that they are safe spaces. According to Marriott: “We are committed to providing you with a safe environment that aligns with expert protocols for working to defeat Covid-19. Consisting of inhouse and external experts in food and water safety, hygiene and infection prevention, and hotel operations, our Marriott Cleanliness Council is redefining our cleaning and safety standards. We will actively monitor and evolve our solutions to ensure a continued focus on the health and safety of our guests.”

All the major hotel chains say they are following the advice of the World Health Organisation and the Center for Disease Control in the US and the local rules in the EU.

The measures range from social distancing, obligatory masks in public areas, increased ventilation and contactless payment – but by

“

If suppliers want to win customers back they must do everything possible to ensure safe conditions



far the most important remains the sanitising of hotel rooms, and guidelines abound.

Even AirBnB has taken advice from former surgeon general of the United States, Vivek Murthy, to come up with a “five-step enhanced cleaning process.” Hosts who don’t agree to the new Covid-19 safety practices by November 20, 2020 may be unable to accept new reservations, have their listings suspended, or be removed from Airbnb altogether.

The message is clear: if hotels and transport services want to attract customers back in uncertain times, they must do everything possible to ensure safe, hygienic conditions.

The more harmonised these rules are the easier they will be to comply with, but the European Union is still behind the curve in agreeing a common position and there are variations from country to country and region to region, so it remains incumbent upon travellers to check the safety protocols with each hotel and airline themselves. As time-consuming as it may be, vigilance is likely to pay off in the long term. Meanwhile, check with the European Commission’s website prior to travel for information on restrictions in each member state.

• Jennifer Baker is a Brussels-based journalist reporting on European affairs, including technology, transport and politics

Travelling on business has never been so challenging, but there's always a way. To get a discounted Covid test and fit to fly certificate guaranteed to arrive just in time for your trip visit www.fello.co.uk