



“Everything” You Always Wanted to Know about
Travel Technology... But Were Afraid to Ask!

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Agenda and Points to Ponder

- *Okay, so not “Everything”, let’s talk about The Top 5 or 6 – the “Biggies”, the “Big Enchiladas”, the “Earth Movers”, etc, etc*
 - “Consumerization”
 - “Portals”
 - “Mid Office”, aka File Finishing, QC, PNR Editors, etc.
 - “Mobile”
 - “Distribution 2.0”
 - “Open Booking”
- Why is this important to me?
 - “So What, Who Cares?” A mantra to live by!!!

Curt's Rules of Technology

1. **Never, ever** accept the “X.0” release of any technology product!
 - Always wait for “X.1” or later version (when possible)
 - They're not “**Bugs**”, they are “**Undocumented Enhancements**”, or as MicroSoft would like to say, “**Service Packs**”
2. **Always add** at least 90 days to any date promised
 - And maybe even validate who's “Q1” they mean
3. **Always ask** who tested it, and with what **live** customer that you can **actually speak with**

Consumerization

- Travelers are demanding. They are early adopters who have incredibly high expectations of the systems & tools they use to manage their travel & expenses.
- Don't just think of a TRIP as getting on a plane : it's client meetings across town where your employees drive, it's a luncheon for clients in a different office building.... It's an expanded universe
- Travelers are used to highly tailored, personalized, easy-to-use experiences in their personal life, and they're bringing that expectation to work with them.

What's driving the change?

- Better Tools
- Mobility



[confined]



open

What's driving the change?

- Demographics

Younger Travelers Less Likely To Comply*

2010 Transactions That Complied With Company Preferred Vendor And Booking Channel Policies, By Age Group

	<35	35-54	55+
Airlines	46%	63%	76%
Car rental	47%	64%	82%
Corporate card	46%	71%	78%
Hotels	43%	61%	76%
Booking channel	47%	67%	81%
Expense reporting tool	51%	75%	88%

* Traveler respondents only

This might not be a bad thing

Average managed travel spend per day: **\$1,077**

Average unmanaged travel spend per day: **\$630**

What's driving the change?

- Traveler flexibility is trumping corporate compliance

Percent Of 2010 Transactions That Complied With Preferred Vendor Policies

Calculated Averages



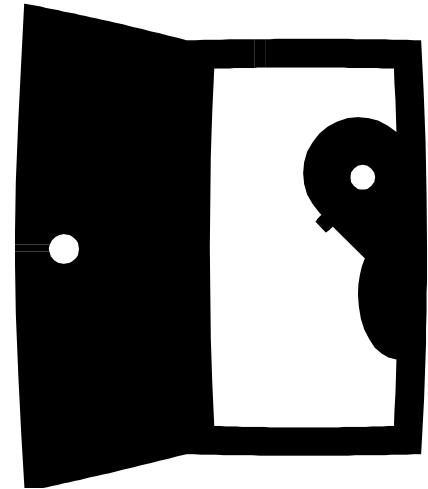
Fewer than 2/3 of travelers comply with booking channel policies

Less than half comply with hotel policies.

Travel managers are being perceived as the “bad guy” by business travelers asked to comply with corporate travel policy.

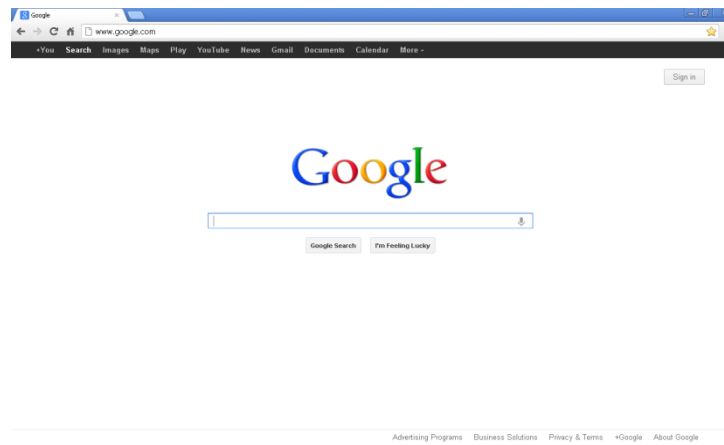
“Portals”

- What the heck is a “Portal” really?
 - Private labeled home page?
 - URL redirect links (so what)
 - Customer probably already has a “Portal”
- Who is “selling” what, and to who’s benefit?
- What will YOU have to “SUPPORT”?
 - (aka *“live with”, “try to explain”, “beg for forgiveness when it fails”*)



“Portals” – cont.

- Is this a “Portal”?



- *Why Yes, Susie/Timmy, it is! It is supposed to help us!*

“Mid Office”, aka “File Finishing”, “QC”, “PNR Editors”, etc

- What other technologies do you procure from which other vendors?
 - They all promise the world, how many deliver?
 - To who’s benefit? OR, to who’s expense?

- Technology hates a “void”!
 - Somebody will build, and claim, the proverbial “better mousetrap”



- **The “I” Word (Integration)!!!!** (really important, see how many exclamation points)

“Mobile”



- Industry today is evolving into a traveler-centric industry...powered by technology that is mobile, social, local and personalized.
- In the past decade the use of web and mobile devices has grown exponentially...- our accessibility and productivity changed radically, and individuals could control more and more of their own information outside of the control of the organization and, as a result, experience massive increases in productivity
- There are roughly 17,000 travel apps out there, and the average business traveler has at least 10 travel-related apps on their phones.
 - *FlyRights, SeatGuru, GateGuru, Instagram, Triplt, Yelp, AroundMe, TripAdvisor, Google Translate, GasBuddy, MyTSA, WikiTude, Skype, AccuWeather, FlightTrackPro, WiFiFinder, TippingBird, mPassport, and many, many more*

US Mobile Travel Report: Market Sizing and Consumer Trends Feb 2013

- Nearly two thirds of US online travelers own a smart phone, one third own a tablet and a quarter own both in addition to their laptop
- Smartphone ownership increased from 52% in 2011 to 64% in 2012
- Tablet adoption nearly tripled in 2012, with 31% of US online travelers owning a tablet, compared to 12% the previous year. Among those who did not own a tablet, over 1/3 planned to purchase one in 2013.
- 51% of mobile web users shopped for travel products such as hotel rooms, flights or car rentals on a smartphone in 2012, up 8% from 2011.
- Travelers are slightly more likely to purchase hotel vs. flights, with 19% and 14% doing so respectively.
- US mobile/leisure/unmanaged business travel gross bookings totaled nearly US\$7.9 billion in 2012, representing 6% of the online travel market
- BY 2014, mobile bookings will grow to \$25.8 billion, representing 8% of the total travel market and 18% of the online travel market.

US Mobile Travel Report: Market Sizing and Consumer Trends Feb 2013

Where Travelers Book Depends on What They're Booking

- Forty-four % of US mobile travel gross bookings were transacted via online travel agencies (OTAs) in 2012, while 56% were supplier direct.
- OTAs dominated the mobile hotel segment, capturing nearly two thirds of gross bookings in 2012, driven largely by last-minute hotel-seekers
- A much smaller share of airline and car mobile gross bookings were made via OTAs, just 22% and 30%, respectively.

“Mobile”

- *“So you got a smart phone... That don’t impress me much!” ~~
Shania Twain*



- *Android, iOS All, Blackberry, Windows*
 - *What platforms are supported and By Whom?*
- *What will, or do, they deliver that the industry giants don’t?*
 - *WorldMate (now owned by CWT), TripCase (owned by Sabre), Triplt (shameless plug), Concur Mobile (another shameless plug)*

“Distribution 2.0”

- Where or where does the content come from?
 - Direct Connects
 - By who’s definition? In what context?
 - Web site screen scraping
 - GDS’s
 - Other?



“Open Booking” – a brave new world?

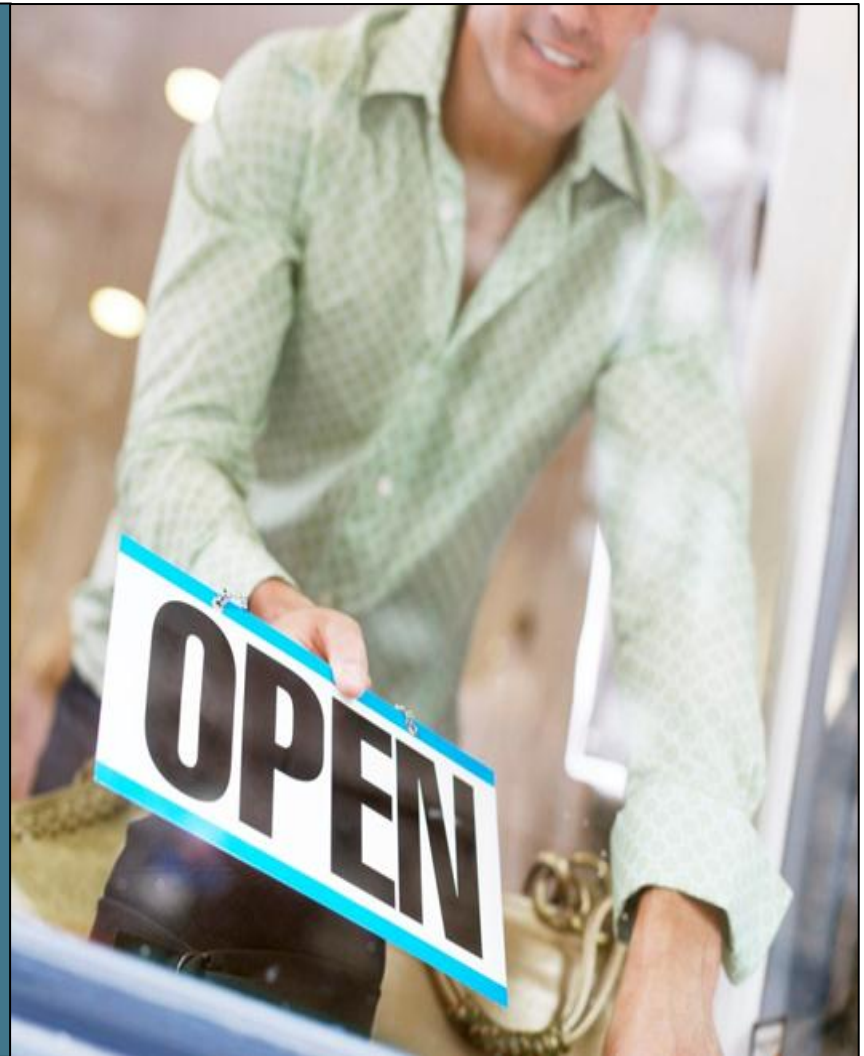
- Does “100% Adoption” really exist?
 - Compliance, compliance, thou shalt comply!
- How about “Capture Booking”, instead of Open?
 - Data visibility, Duty Of Care, and more
- “Why doth thou protest so much?”
 - It’s been happening for years... really!



Open Booking LEVEL SET

Open Booking is NOT an alternative to managed travel.

It's an additional option for gaining insight into travelers' statistics where there has never been an ease of visibility.



the **CULTURE** of work
has been **CHANGING**

...for decades.

Today it's all about
the **internet**
& **smartPhones**.





More

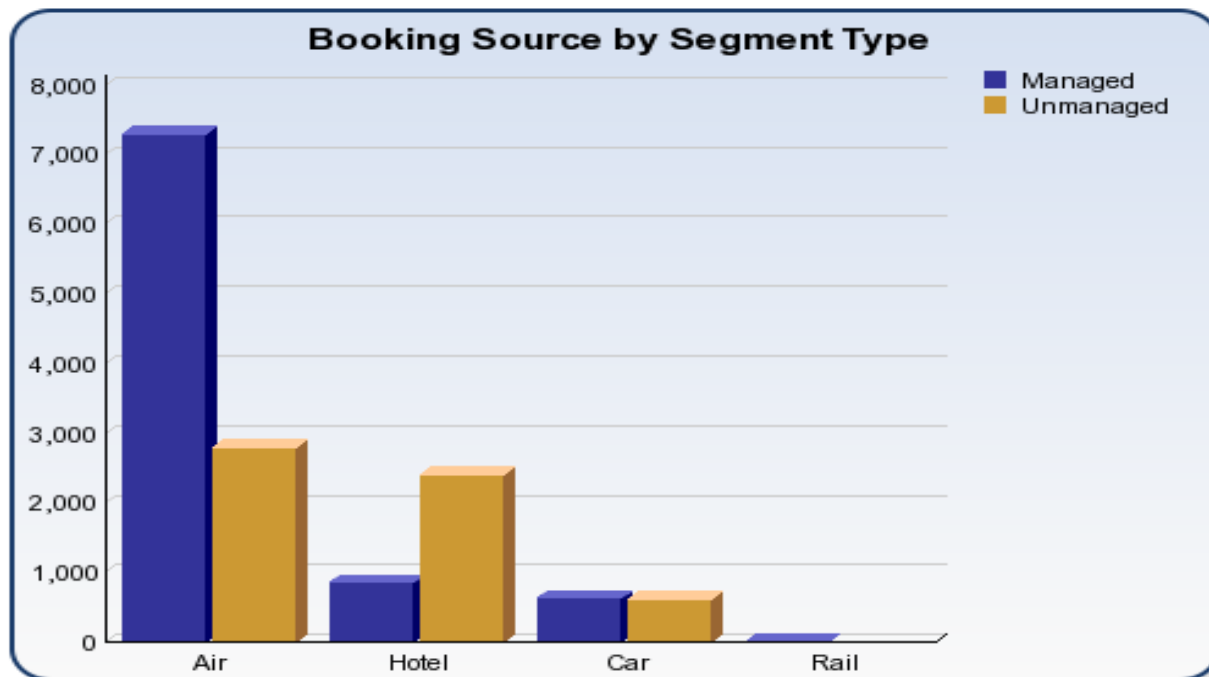
Control?

I love my travelers, but

What's in it for ME?

Open Booking Data: Could look like this!

Where is your unmanaged spend occurring?



Aug 8, 2012

1

How much of your travel spend is unmanaged?

	Managed Approved	Managed Itinerary	Unmanaged Approved	Unmanaged Itinerary
Average Air Ticket	493.97	8,749.44	469.59	3,033.29
Average Hotel Night	198.96	10,248.00	207.40	1,113.66
Average Car Rate	387.46	3,773.82	321.21	895.92

Aug 8, 2012

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Q&A

- *“Trust, but verify!”* Ronald Reagan, Gov. Chris Christie, Mom
- Product Specific?
- Terminology?
- Politics, Partnerships, and Panaceas?

Thank you very much for your time!