BALANCE

GBTA CONVENTION 2016

Mobile Strategy
Bridging the Gap between Traveler Experience and Travel Management

Carole Moreira, mTrip

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Time Duty of Care Experience Info... ...edge Price Policy
Productivity Rates Retention Risk ...ngs Safety Data
Risk Speed Spend Risk
Rates Productivity Risk Safety Effici... Convenience Cost

BALANCE

Bridging the Gap between Traveler Experience and Travel Management

'only about half of travel managers realize **how intrinsic to the business travel experience travel apps have become'.**

Business Travel News' Mobile Migration Research Study 2015

Déjà Vu!
Many business travelers started using personal smartphones before their company decided to upgrade their professional devices.

Summary

1. **Traveler Experience vs. Travel Management,** the disruption

2. **The Mobile App Revolution,** a world of opportunities

3. **Bridging The Gap,** mobile solutions

4. **Q&A,** walking the path

1. TRAVEL EXPERIENCE VS. TRAVEL MANAGEMENT

The disruption

Time   Duty of Care   Experience   Inf...   ...edge   Price   Policy
Productivity   Rates   Retention   Risk   ...ngs   Safety   Data
Risk   Speed   Spend   Risk
Rates   Productivity   Risk   Safety   Effici...   Convenience   Cost

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1. Traveler Experience vs Travel Management… the disruption

DISRUPTION

disturbance or problem that interrupts an event, activity, or process.
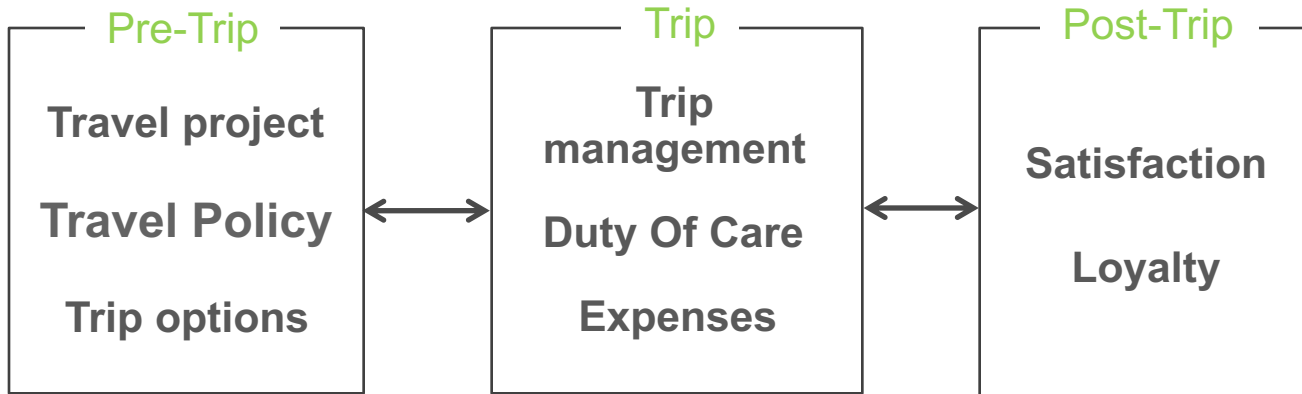
OPPORTUNITY

a set of circumstances that makes it possible to do something.

SOLUTION

a means of solving a problem or dealing with a difficult situation.

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BALANCE

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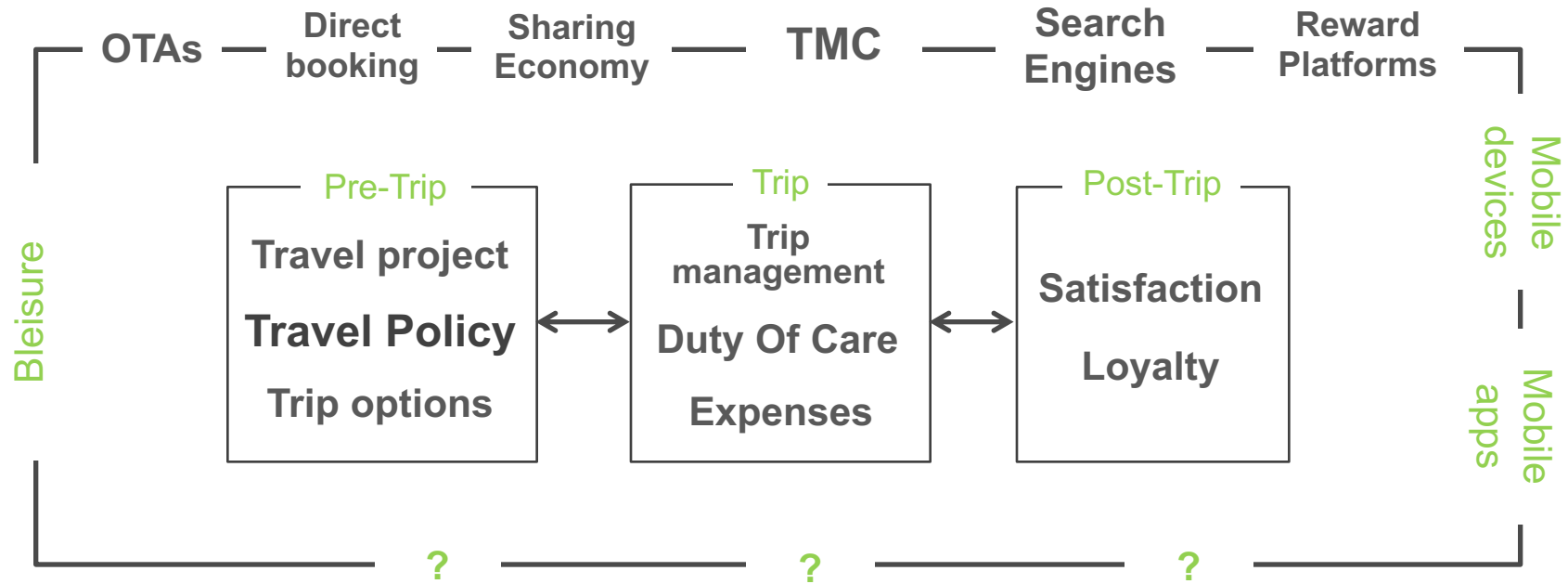Rates   Productivity   Risk   Safety   Effici   Convenience   Cost

1. Traveler Experience vs Travel Management… the disruption

➢ In a perfect world, **it's all under control with a TMC** (Travel Management Company)

Pre-Trip	Trip	Post-Trip
Travel project **Travel Policy** **Trip options**	**Trip management** **Duty Of Care** **Expenses**	**Satisfaction** **Loyalty**

Time   Duty of Care   Experience   Inf...   ...edge   Price   Policy
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1. Traveler Experience vs Travel Management… the disruption

➢ In reality, **it's all over the place with the travelers**

OTAs — **Direct booking** — **Sharing Economy** — **TMC** — **Search Engines** — **Reward Platforms**

Bleisure

Mobile devices

Mobile apps

Pre-Trip

Travel project

Travel Policy

Trip options

Trip

Trip management

Duty Of Care

Expenses

Post-Trip

Satisfaction

Loyalty

? — ? — ?

Time   Duty of Care   Experience   Inf...   ...edge   Price   Policy
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1. Traveler Experience vs Travel Management… the disruption

➢**About Mobile Apps,** GBTA Study 2016

Which Travel-Related Apps Do Business Travelers Typically Use *Most* While Traveling?
North America-based business travelers

■ United States (n=502) B   ■ Canada (n=254) C

Airline
57% | C | 50%

Online Booking Site (Kayak, Hotels.com, etc.)
41% | | 43%
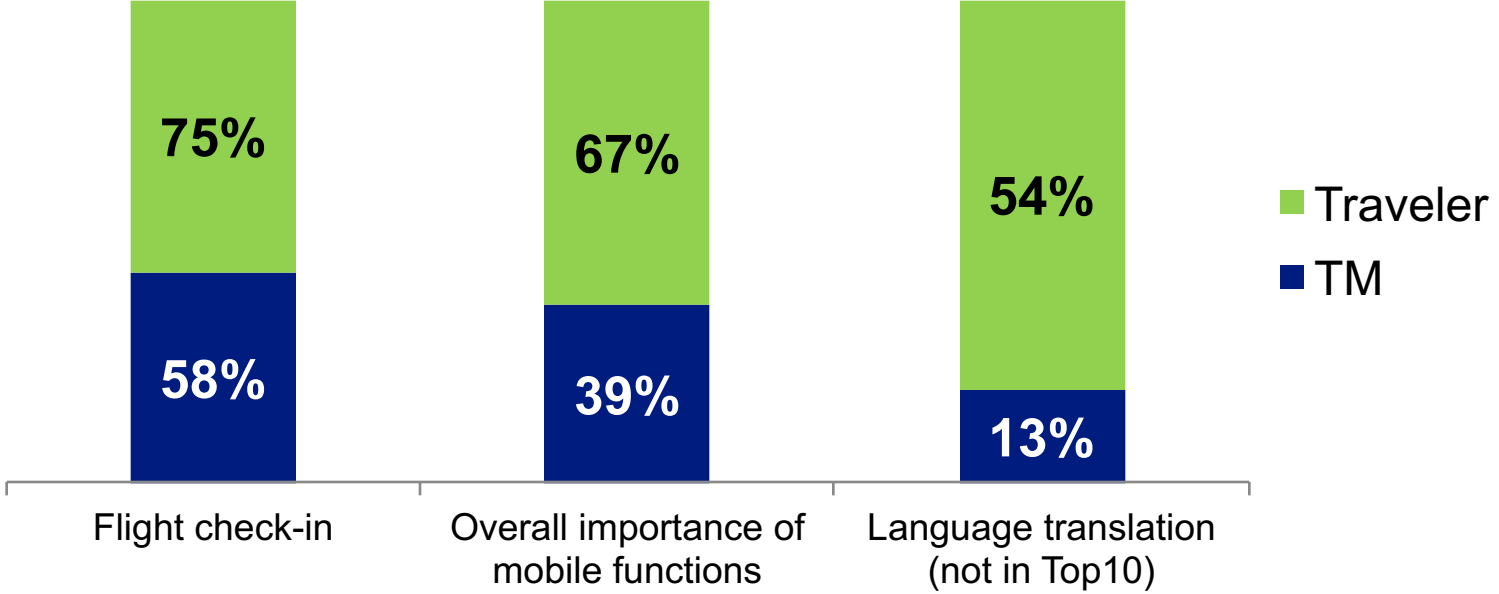
Lodging
41% | C | 32%

Interest for Mobile Payment

Percentage Who Would "Likely" / "Very Likely" Use E-wallet Technology / Mobile Payment -by age	18 to 34 B	35 to 54 C	55 or over D
🇺🇸 (n=103-258)	79% CD	58%	47%
🇨🇦 (n=52-126)	64% D	56% D	31%
🇩🇪 (n=55-121)	73% CD	57%	48%
🇮🇹 (n=36-156)	83% D	75% D	58%
🇪🇸 (n=25-137)*	76% D	76% D	54%
(n=50-137)	52% D	43%	29%

If you had the opportunity to use mobile payment and/or e-wallet technology for business travel, how likely would you be to use it?
* Small sample size (n<30) for Spain-based travelers 55 or older

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1. Traveler Experience vs Travel Management… the disruption

➢ **The gap about mobile functions,** BTN Study 2016

	75%	67%	54%	■ Traveler
	58%	39%	13%	■ TM
	Flight check-in	Overall importance of mobile functions	Language translation (not in Top10)	

Time   Duty of Care   Experience   Inf...   ...edge   Price   Policy
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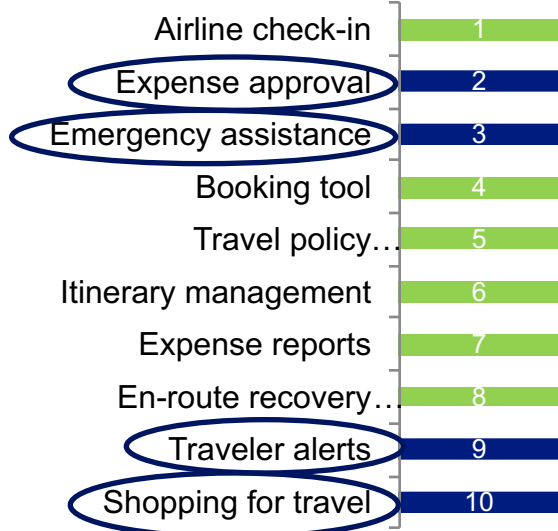
1. Traveler Experience vs Travel Management… the disruption

➢ **The gap about mobile functions,** BTN Study 2016

Travelers Top10

Function	Rank
Itinerary management	1
Airline check-in	2
Destination information	3
Booking travel	4
Mobile payment	5
Hotel check-in	6
En-route recovery service	7
Itinerary sharing	8
Travel policy…	9
Expense reports…	10

Buyers Top10

Function	Rank
Airline check-in	1
Expense approval	2
Emergency assistance	3
Booking tool	4
Travel policy…	5
Itinerary management	6
Expense reports	7
En-route recovery…	8
Traveler alerts	9
Shopping for travel	10

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1. Traveler Experience vs Travel Management… the disruption

Monica Sanchez, director of research for the GBTA.
"What Apps Business Travelers Use and Why", GBTA 2016 Study

According to the study, **most companies stay silent on the question of apps:** 20 percent or fewer of the respondents from most countries said their employer had specific apps they required for business travel, while **about half said no travel apps were recommended.** Between one-fifth and one-third of respondents said they were allowed to use their own favorite apps.

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1. Traveler Experience vs Travel Management… the disruption

Monica Sanchez, director of research for the GBTA.
"What Apps Business Travelers Use and Why", GBTA 2016 Study

"The limited efforts by most Travel Managers to require or promote travel apps may contribute to low usage rates for TMC and expense management apps," the report said. "However, travel managers should also consider **the costs of remaining idle.** They could miss an **opportunity to curb out-of-policy behavior** that travelers might engage in when they use their own favorite apps."

Déjà Vu!
Travel Managers struggling to adapt their Travel Programs (OTA, Uber, Airbnb)
TMC loosing clients to OTAs and New Tech Players (FligthFox, Upside, Rocketrip)

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Productivity · Rates · Retention · Risk · [thi]ngs · Safety · Data
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1. Traveler Experience vs Travel Management… the disruption

Mike McCormick, GBTA's executive director and chief operating officer.
"What Apps Business Travelers Use and Why", GBTA 2016 Study

"Technological innovation has given business travelers **greater control of their own travel**, but that **doesn't need to mean trouble** for a managed travel program"

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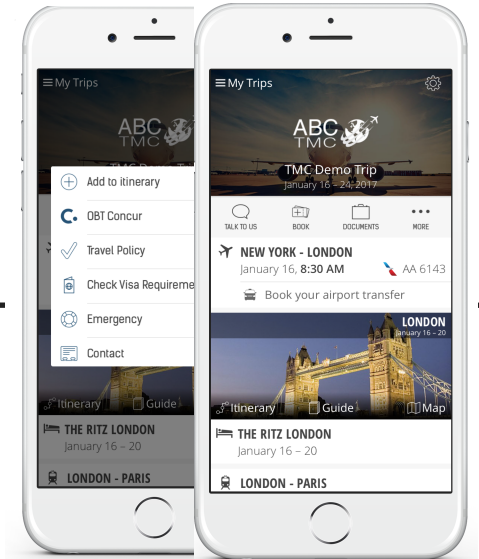BALANCE

1. Traveler Experience vs Travel Management… the disruption

'The only constant thing in life is change'

(François de la Rochefoucauld… and Bouddha)

We are all very fast at changing our personal mobile devices for the newer model… how fast can we now shift to a corporate mobile mindset?

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2. THE MOBILE APP REVOLUTION

A world of opportunities

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Time · Duty of Care · Experience · Inf... · ...edge · Price · Policy
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2. The Mobile App Revolution... a world of opportunities

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2. The Mobile App Revolution... a world of opportunities

➤ **Learnings from Google and the Apple Store**

Google Search 'Travel app'
Apr.2016 = about 32,300,000 results
Jul.2016 = 382,000,000 results

Google Search 'best travel app'
Apr.2016 = 38,700,000 results
Jul.2016 = 262,000,000 results

Google Search 'bots'
Jul.2016 = 102,000,000 results for 'bots'
Jul.2016 = 2,020,000 results for 'chatbots'

Apple Store
Sep.2015 **= 65,000 travel apps**

Most popular Apple App Store categories in June 2016

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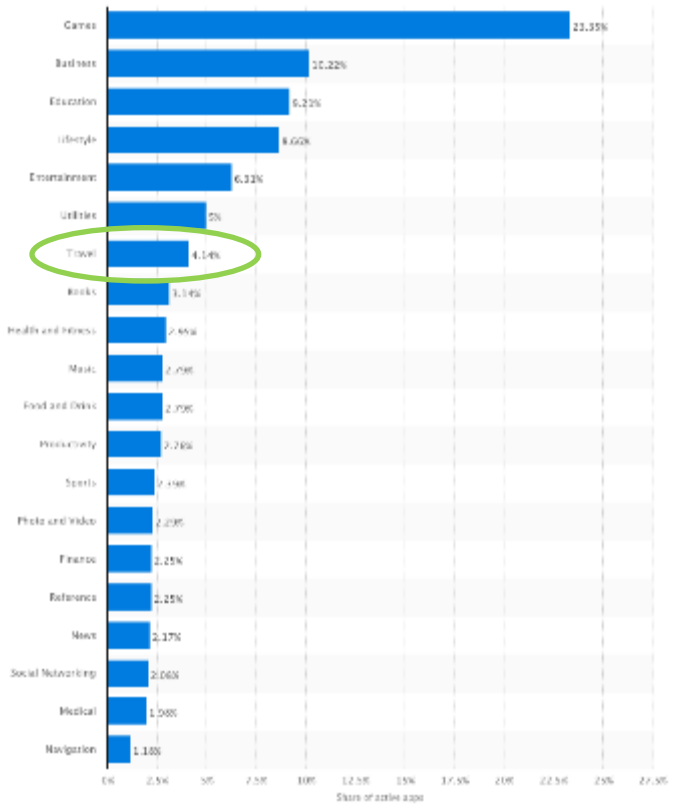
2. The Mobile App Revolution... a world of opportunities

"In general, I think we've seen that the corporate technology world still lags behind that leisure world," said Monica Sanchez, director of research for the GBTA. "It's a lot more complex, so it hasn't been able to catch up to our other world."

Monica Sanchez, director of research for the GBTA.
GBTA 2016 Study "What Apps Business Travelers Use and Why"

Spoiler Alert
Leisure Tech is catching up with the Corporate World!
(Specialised Mobile Travel Tech companies have developed 'mixed' b2c-b2b apps, Airbnb is signing with TMCs,…

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GBTA CONVENTION 2016   BALANCE

2. The Mobile App Revolution... a world of opportunities

Think leisure players aren't touching business travel, think again.

Tnooz, Feb2016, about Business Travel Show

Déjà Vu!
Leisure Companies have a history for launching and acquiring TMC divisions
(Expedia, Flight Centre, Travel Leaders,…)

'Admittedly the bank's travellers are looking to **Airbnb** for extended stay trips which supports GBTA findings from last year revealing that almost **75% of Millennials had taken an extended stay in the past 12 months.**'

2. The Mobile App Revolution... a world of opportunities

➤ About Travelers and Bleisure (Business+Leisure)

According to The Bleisure Report (2014) conducted by BridgeStreet [AF1] Global Hospitality on behalf of Skift, **83% of business travel respondents use spare time on trips to explore the city** they're in….

An impressive **96% of respondents believe they gain cultural experience and knowledge** through bleisure trips...

One of the main reasons **road warriors turn into bleisure travelers** is that it **takes the stress out of business travel**. ….Being able to spend more time in a city and acclimate to its culture can help the traveler **better understand the relevant business environment**.
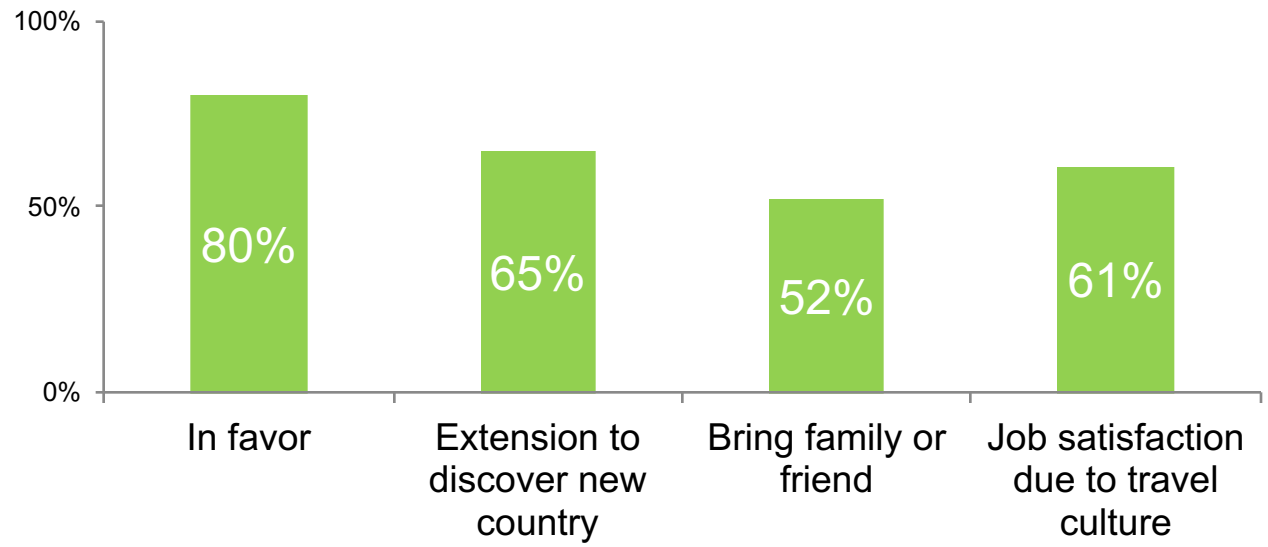
Bleisure travel also **improves employee satisfaction**; 78% of survey respondents said combining the two types of travel **makes their work more meaningful by adding value** to work assignments.
Bleisure and Travel Policy:

For companies and travelers, **the line separating business and leisure travel often can be difficult to determine.**

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2. The Mobile App Revolution... a world of opportunities

➢ **About Travelers and Bleisure** (Business+Leisure)
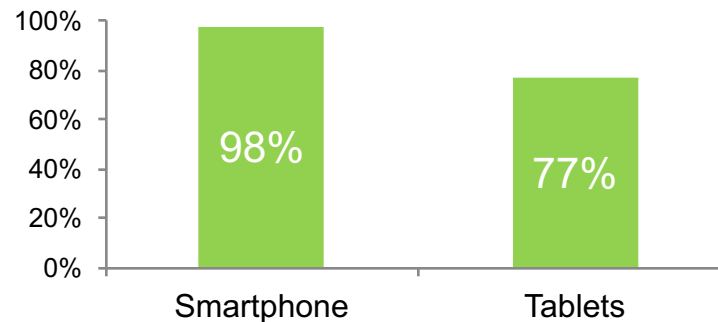

Source: The Bleisure Report (2014) conducted by BridgeStreet [AF1] Global Hospitality on behalf of Skift

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2. The Mobile App Revolution... a world of opportunities

➤ **About capturing bookings, data, and attention 24/7**

- Forecast Predicts 50% of Digital Travel Purchases in 2016 Will Be Via Mobile
  (Source: Skift article, The New Mobile Booking Majority - Nov2015).

- Travelers are duplicating and even triplicating their access to information on the go, including travel content and travel apps.
  (Source: BTN's 2015 Mobile Migration report)

Traveler device (300 travelers surveyed)

	Smartphone	Tablets
100%	98%	77%

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2. The Mobile App Revolution... a world of opportunities

➤ **What b2c+b2b 'mixed' apps do to keep travelers engaged 24/7**
   (Source: Presenter's Industry Insight)

Bookings tools + travel policy
- Flight & hotel bookings
- Attraction tickets, city cards, tours, and activities
- Car rentals and airport transfers
- Travel insurance, visa services,…

Risk Management
- Real time critical information and tips for sensitive destinations
- Alerts

Travel Experience
- Flight details & mobile check-in
- Real-time flight status & alerts
- Flight sharing, airport directions, Uber integration
- Accommodation details & hotel check-in
- Offline maps & geolocation – street search
- Offline directions by foot, subway, and car
- Destination information and guides

2. The Mobile App Revolution... a world of opportunities

➢ **What b2c+b2b 'mixed' apps do to keep travelers engaged 24/7**
(Source: Presenter's Industry Insight)

Customer Service

- In-app messaging: email, chat system, CRM,…
- Push-notifications (including geolocalised)
- In-app satisfaction surveys and product rating

Document Delivery

- Automated email itineraries
- Itinerary backup provided in PDF
- Online travel dashboard
- Travel documents
- Custom documents and online branding

Offline Features

- Extensive travel guides (attractions, restaurants, nightlife, shopping, etc.)
- Offline maps and directions
- Suggested itineraries according to preferences tools
- Practical information about the trip destinations
- Trip journal shared on social media with friends or business project team
- Augmented reality

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2. The Mobile App Revolution... a world of opportunities

➤ **OTA apps satisfaction survey,** mTrip Feb2016 – 419 respondents

4.6/5 Average user rating   85.17% Information provided Excellent / Good   80.56% Usability Easy / Very easy

HAVE YOU USED THE APP YOU DOWNLOADED?
88.54%YES

ARE YOU SATISFIED WITH YOUR EXPERIENCE USING THE APP?
93.66% Satisfied and Very Satisfied

WOULD YOU RECOMMEND OUR APP TO OTHER TRAVELERS?
92.51%YES

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2. The Mobile App Revolution... a world of opportunities

➢ **OTA apps satisfaction survey,** mTrip Feb2016 – 419 respondents

At which point during your trip have you used the app?

61.96% Before the trip & at destination

21.61% before the trip only

16.43% at destination only

Which features have you found to be the most useful?
Information about the trip
90.32%
Being able to use the app offline
85.47%
The offline map
83.89%
Information about attractions
79.53%
Information about restaurants
65.98%
Offline directions
65.20%

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3. Bridging The Gap... mobile solutions

➤ **What Travel Consumers Want**
Travel Weekly's Consumer Trends Study summer 2015, May2016 (sponsored by Sabre)

In short, **consumers are looking for a personalized yet simple shopping experience** that they can explore and commit to at their own convenience.

And of course, **price is always a factor—though not always the final determinant**. "Our research has shown that even with a low-fare search, one that's focused on price, it's often not just about the lowest price a traveler can find," says Parker. "So we might find that a traveler is willing to pay a little more to not have a center seat or to fly nonstop instead of having a connection. It's **not a singular focus on price, but about finding the right trip and the right experience for the best price**. That complexity is another reason why **travelers are going back to travel agents**."

2. The Mobile App Revolution... a world of opportunities

Travel companies will be faced with a slew of new opportunities to innovate and design products and services that make **business travel** more **seamless**, more **productive** and more **inspiring**.

The Bleisure Report (2014) conducted by BridgeStreet, Global Hospitality on behalf of Skift

BALANCE

3. BRIDGING THE GAP

Mobile Solutions

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3. Bridging The Gap... mobile solutions

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3. Bridging The Gap... mobile solutions

"**Travel buyers** can recommend apps for their travelers to help **drive compliance** and can also take advantage of technology to **track** and more easily **assist** their travelers in case of an emergency, helping fulfill their **duty of care** requirements."

Mike McCormick, GBTA's executive director and chief operating officer.
GBTA 2016 Study "What Apps Business Travelers Use and Why"

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3. Bridging The Gap... mobile solutions

➢ **What are Travel Buyers doing**

A recent survey from American Express GBT, shows that since 2014
companies in Europe have changed their priorities when it comes to business travel.

#1 Security
Due to recent events, security has become a primary focus and has therefore shifted to first position since 2014.

#2 Cost Control
45% of the companies that participated in the study, want to improve their process by implementing new booking tools and expense management software.

#3 Traveler Satisfaction
Previously at the 6th position in 2014, business traveler satisfaction has made a real jump.

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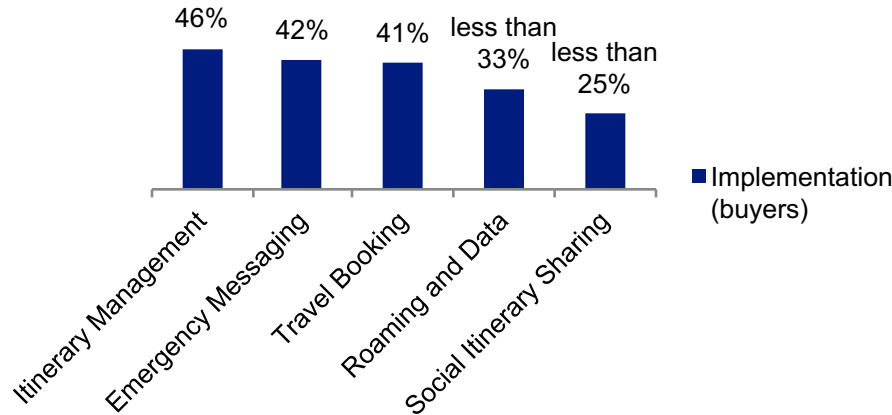
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3. Bridging The Gap... mobile solutions

➢ **What are Travel Buyers doing**

(Source: BTN's 2015 Mobile Migration report, 20 elements of mobile travel surveyed)

- Implementing apps on a case-by-case basis as they learn about them or to prevent risk
- Concerned about data security
- Developping apps of their own

Mobile Travel Policy

Bar chart "Mobile Travel Policy" with legend "Implementation (buyers)":
- Itinerary Management: 46%
- Emergency Messaging: 42%
- Travel Booking: 41%
- Roaming and Data: less than 33%
- Social Itinerary Sharing: less than 25%

➢ *Only 43% of travelers pegged the travel management role as "very involved" in setting mobile travel policies*

➢ *42 percent said IT departments were "very involved,"*

➢ *while HR and procurement departments each were much less involved.*

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3. Bridging The Gap... mobile solutions

➢ **Travel Buyers Feedback**
(Source: BTN's 2015 Mobile Migration report, 20 elements of mobile travel surveyed)

Less than 50% of travel managers were 'very satisfied' with their current management strategies about mobile travel.

*Considering the abundance of travel apps available to consumers, travel managers at these companies—often representing highly regulated industries like healthcare, insurance and finance—report **slow development and low adoption of internally developed apps.***

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3. Bridging The Gap... mobile solutions

➤ **About Travel Buyers**

(Source: BTN's 2015 Mobile Migration report, 20 elements of mobile travel surveyed)

Companies with very large travel programs have made the most progress, citing higher levels of travel manager involvement in mobile and **a willingness to go to outside partners** to support overall mobile travel strategies.

One option would be to **outsource the strategy, relying on a TMC, consultant or third-party technology provider** to run the charge, but fewer than half of the travel buyers surveyed said their companies are taking that option.

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3. Bridging The Gap... mobile solutions

➤ **About the TMC**

"Artificial intelligence, bots and apps, Predictive analytics,
Virtual payment, Advanced telephony, Alternative
distribution, Expense management.
Clients expect their travel management companies to
**keep up on a lot of technology. Those that
couldn't are mostly gone."**
BMTTE (Business Meetings Travel&Technology Expo) session for Sep2016

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3. Bridging The Gap... mobile solutions

> **What are TMC doing**
> (Source: Presenter's Industry Insight)

- **Catching-up** with consumer technology trends
- **Recommending** 3rd party apps from the industry (GDS, Expense Management,…)
- **Investing** in branded customized mobile solutions
- **Going the extra mile,** providing clients with their own branded custom apps

> Some might be able to absorb the cost of their apps, considering them as a necessary evolution and an opportunity to improve client engagement/loyalty, revenue and image.

> some might raise their service fee, considering the value-added of a customized app.

> some might charge their clients, sometimes packaging a branded customized app with other services (DOC, Expense Management, etc.).

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3. Bridging The Gap... mobile solutions

➢ **What are 3ʳᵈ party providers doing**

(Source: Presenter's Industry Insight)

GDS, Risk Management, Expense Management
- most have developed their own apps
- some will partner with mobile app solutions providers

Travel software providers (non-app)
- many are integrating with their client's choice of app
- some are developing their own app
- some are partnering with mobile app solutions providers

Digital Software providers (non-mobile or app specialized)
- will develop customized apps on-demand

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3. Bridging The Gap... mobile solutions

➢ **What are Mobile Tech companies doing**
(Source: Presenter's Industry Insight)

Mobile Travel Tech Companies – white label and customized
- most have specialized per market (leisure, business, events,…)
- few have developed 'mixed' models (business+leisure)

Disruptors
- most come from the leisure industry and are now tapping into the corporate travel market with an impact on all stake-holders: Travel Managers (Travel Programs), providers (Uber, Airbnb), TMCs (Upside, Rocketrip, FlightFox)… and watch out for Google and Facebook!

Tnooz, June2016 'When a travel startup goes from B2C to B2B', **Todd Sullivan, co-founder of Flightfox**

We built a basic B2B product as quickly as possible
Trip bookings+Centralized billing+Team member administration+Monthly expense and savings reports
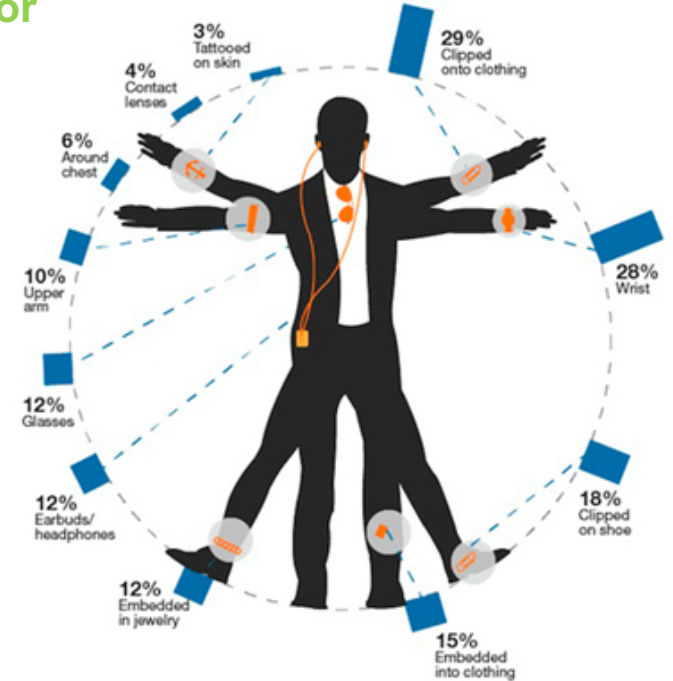**And 200+ businesses signed up in the first two weeks.**

Time · Duty of Care · Experience · Inf... · ...edge · Price · Policy
Productivity · Rates · Retention · Risk · ...ings · Safety · Data
Risk · Speed · Spend · Risk
Rates · Productivity · Risk · Safety · Efici... · Convenience · Cost

BALANCE

3. Bridging The Gap... mobile solutions

> ## About The Mobile World – the device driving disruptor

Become a smart_watcher... wearables, drivables, scannables

- BTN Study 2016 : 20% of travels had smartwatches, travelers tend to be early adopters

- Phocuswright study 2015: **travelers are adopting wearable at a faster pace than general consumer**, of 975 respondents, 15% had wearable devices versus 9% overall consumers. **66% planned to acquire a wearable device 'in the next few years''**

- Google glasse and all wearables will evolve, who knows what Google is up to…

- Major airlines, itinerary aggregators and hoteliers have created Apple Watch apps.

- **What Apple Watch does already: baggage claim, gate changes, Uber, boarding passes, unlock hotel room, check-in, last-minute bookings,...**

- R.O.B.O.T.S and A.I are already among us, gamification is on the rise, etc.

"How would you be interested in wearing/using a sensor device, assuming it was from a brand you trust, offering a service that interests you?"

3% Tattooed on skin
4% Contact lenses
6% Around chest
10% Upper arm
12% Glasses
12% Earbuds/ headphones
12% Embedded in jewelry
29% Clipped onto clothing
28% Wrist
18% Clipped on shoe
15% Embedded into clothing

Base: 4,657 US online adults (18+)
(multiple responses accepted)

Source: Forrester Research, Inc.

Time   Duty of Care   Experience   Inf...   ...edge   Price   Policy
Productivity   Rates   Retention   Risk   Safety   Data
Risk   Speed   Spend   Risk
Rates   Productivity   Risk   Safety   Effici...   Convenience   Cost

GBTA CONVENTION 2016

BALANCE

3. Bridging The Gap... mobile solutions

'Good apps help in a time of (travel) disruption and aren't just something pretty to look at. You can influence where people stay.'

IAC manager of corporate services, Rosemary Maloney (IAC once owned Expedia)

Travel companies will be faced with a slew of new opportunities to innovate and design products and services that make business travel more **seamless**, more **productive** and more **inspiring**.

Source: The Bleisure Report (2014) conducted by BridgeStreet [AF1] Global Hospitality on behalf of Skift

Time — Duty of Care — Experience — Inf... — ...edge — Price — Policy
Productivity — Rates — Retention — Risk — ...ngs — Safety — Data
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Rates — Productivity — Risk — Safety — Effici... — Convenience — Cost

BALANCE

3. Bridging The Gap... mobile solutions

➢ **Recommandations when choosing a mobile partner**

Mobile Strategy Committee create a versatile and experienced project team that can keep up with new technology and industry trends. Involve a few frequent flyers.

Benchmark solution providers offering both **technology** and **industry experience** (leisure+business), keep in mind your corporate clients and travelers **local culture** (DOC, language,…). You might need more than 1 apps.

Remember it's not about you, **it's about the traveler experience**.

Ownership, security and confidentialy, **check the fine prints.**

Evaluate the **cost of implementation and sustaining your app(s)** for the next 2-3 years.

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Time   Duty of Care   Experience   Inf...   ...edge   Price   Policy
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BALANCE

3. Bridging The Gap... mobile solutions

➢ **Recommandations when choosing a mobile partner**

Going mobile is not as straight forward as launching a website (complex technology, managing sensible data, native content, etc.)

Building your own app
PROS: full control over the user experience, the features, and the branding.
CONS: budget (requires a full team of developers, designers, project managers), time to market, in-house resources, maintenance and sustainability costs.

3rd Party providers apps
PROS: low price or free.
CONS: generic/unbranded app, limited to GDS information and production, no customized features, low mobile retention.

Mobile travel technology company
PROS: branded and customized solution based on proven core technology, innovation, reasonable cost, no commitment, easy to implement, some will offer mixed market expertise.
CONS: limited choice of mobile travel tech companies, very few with a proven track record.

4. Q&A

Walking the path

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Time   Duty of Care   Experience   Info...   ...edge   Price   Policy
Productivity   Rates   Retention   Risk   ...ngs   Safety   Data
Risk   Speed   Spend   Risk
Rates   Productivity   Risk   Safety   Effici...   Convenience   Cost

BALANCE

4. Q&A… walking the path

Know your traveler's **journey**
Start a **mobile strategy** team
Choose **your partners**
Build some **Travel Program mussel**
Think out **of the B(leisure)OX**
Find **the right mobile solution** to compete

If you're not doing it, your competition is.

Let's discuss your mobile strategy:

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