BUSINESS TRAVEL SHOW AMERICA 2026

INNOVATION FACEOFF

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Senior Director, Global Business Intelligence

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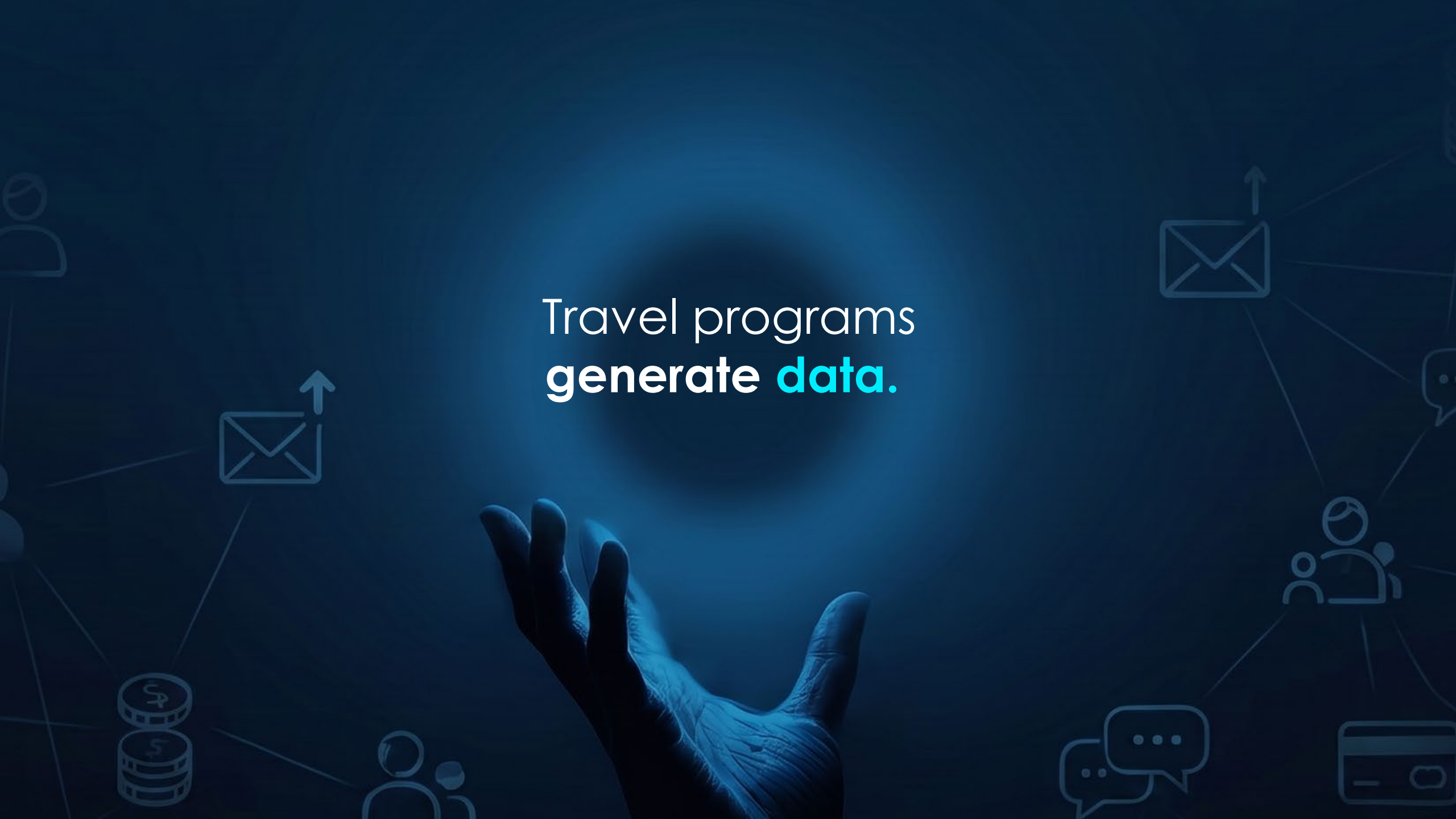
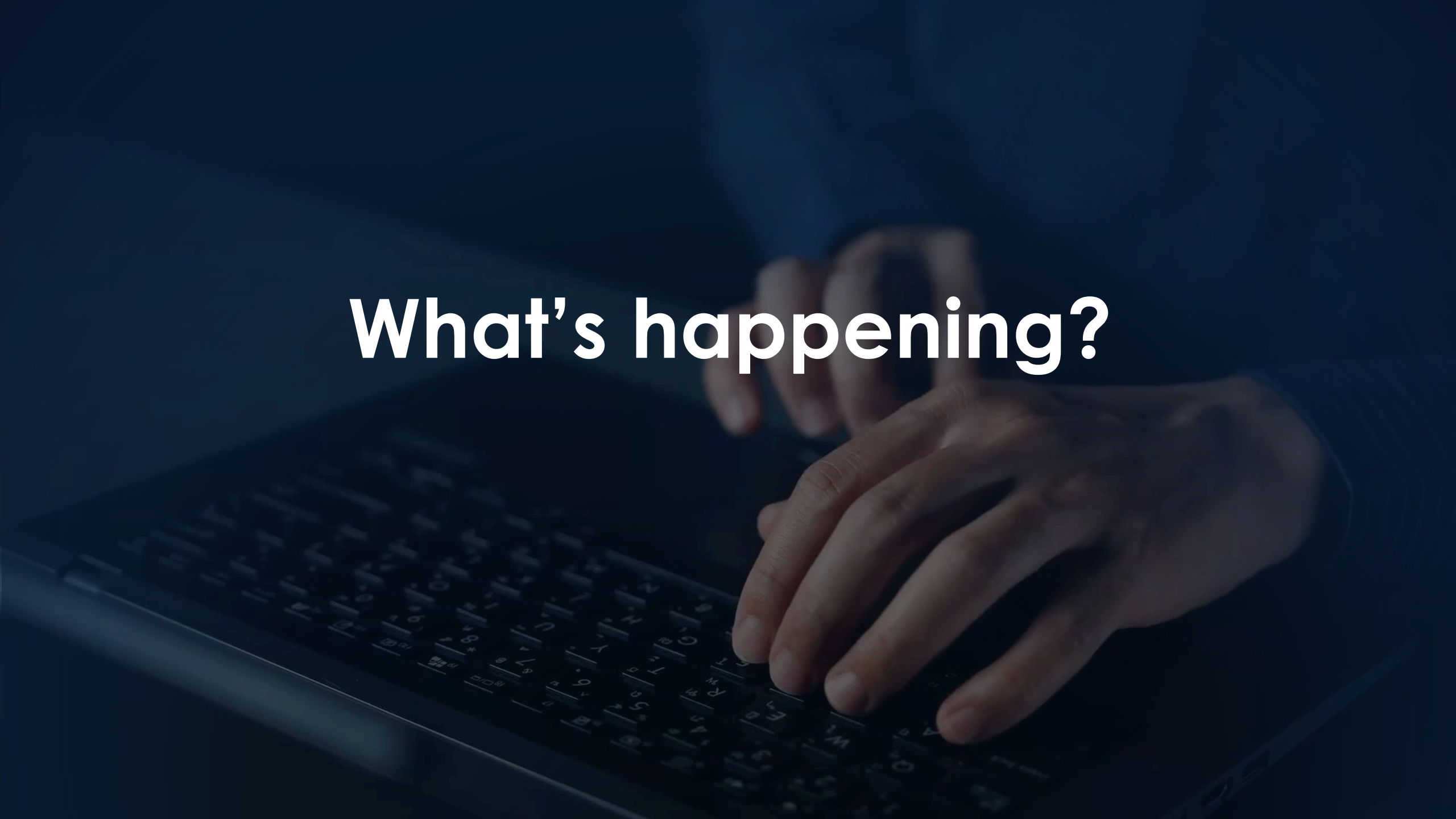

Travel programs
generate data.

Lots of data.

Endless data.



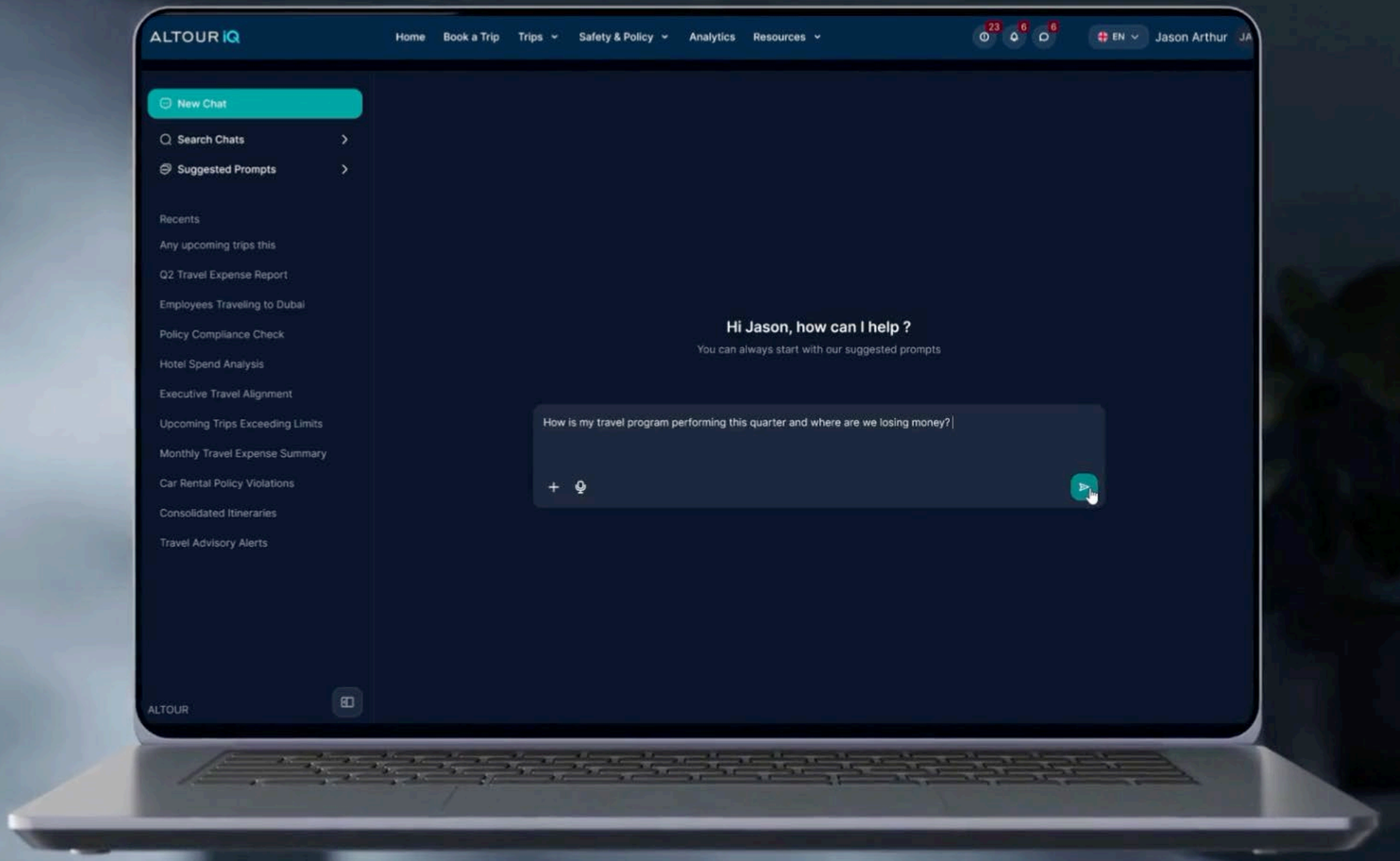
But not always answers.


What’s happening?

Ask Better Questions.


Get Better Decisions.

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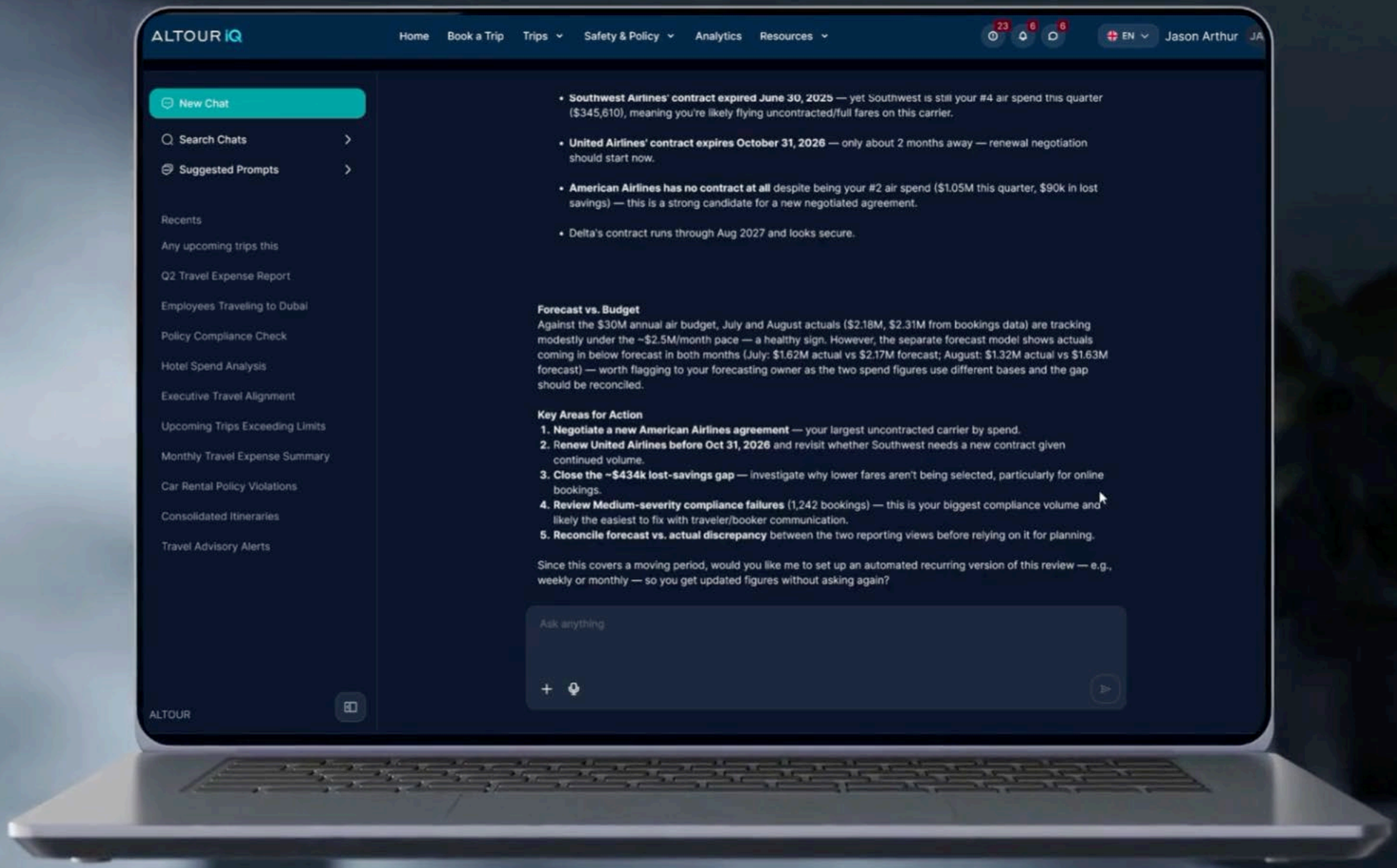
Hi Jason, how can I help ?
You can always start with our suggested prompts
How is my travel program performing this quarter and where are we losing money?

Knowing
is Easy.



Understanding
is Powerful.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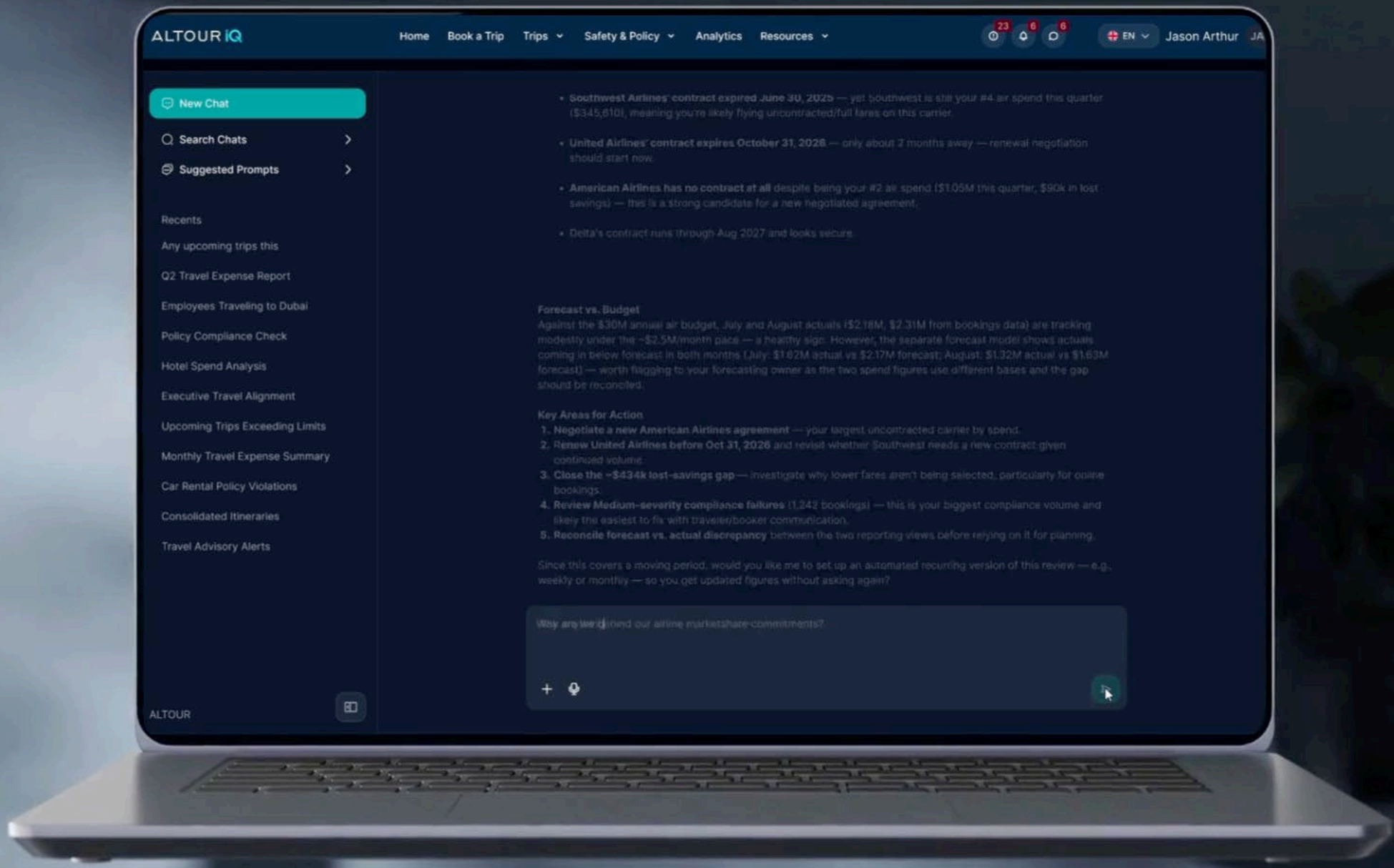
• Southwest Airlines' contract expired June 30, 2025 — yet Southwest is still your #4 air spend this quarter ($345,610), meaning you're likely flying uncontracted/full fares on this carrier.
• United Airlines' contract expires October 31, 2026 — only about 2 months away — renewal negotiation should start now.
• American Airlines has no contract at all despite being your #2 air spend ($1.05M this quarter, $90k in lost savings) — this is a strong candidate for a new negotiated agreement.
• Delta's contract runs through Aug 2027 and looks secure.
Forecast vs. Budget
Against the $30M annual air budget, July and August actuals ($2.18M, $2.31M from bookings data) are tracking modestly under the ~$2.5M/month pace — a healthy sign. However, the separate forecast model shows actuals coming in below forecast in both months (July: $1.62M actual vs $2.17M forecast; August: $1.32M actual vs $1.63M forecast) — worth flagging to your forecasting owner as the two spend figures use different bases and the gap should be reconciled.
Key Areas for Action
1. Negotiate a new American Airlines agreement — your largest uncontracted carrier by spend.
2. Renew United Airlines before Oct 31, 2026 and revisit whether Southwest needs a new contract given continued volume.
3. Close the ~$434k lost-savings gap — investigate why lower fares aren't being selected, particularly for online bookings.
4. Review Medium-severity compliance failures (1,242 bookings) — this is your biggest compliance volume and likely the easiest to fix with traveler/booker communication.
5. Reconcile forecast vs. actual discrepancy between the two reporting views before relying on it for planning.
Since this covers a moving period, would you like me to set up an automated recurring version of this review — e.g., weekly or monthly — so you get updated figures without asking again?
Ask anything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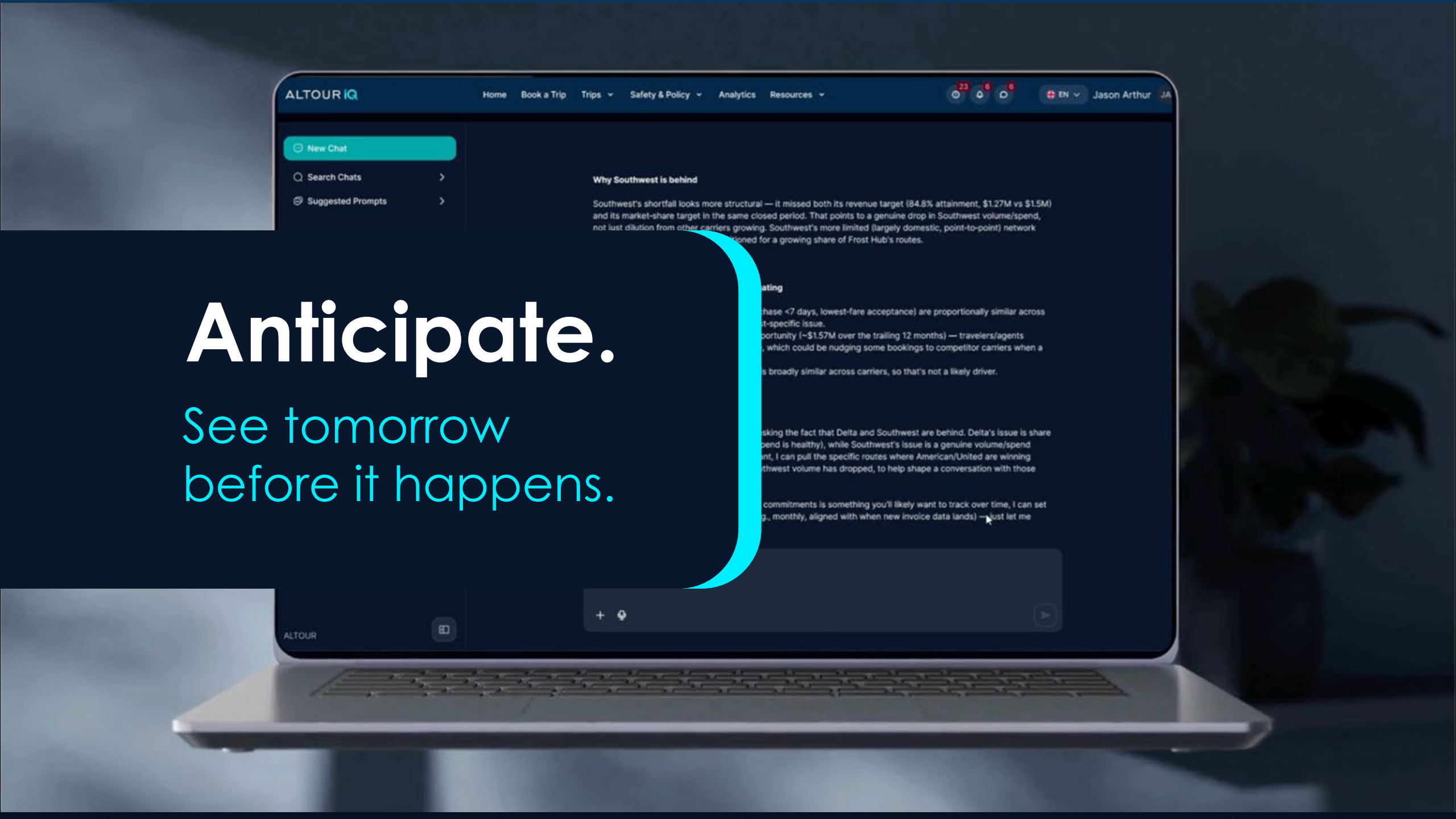
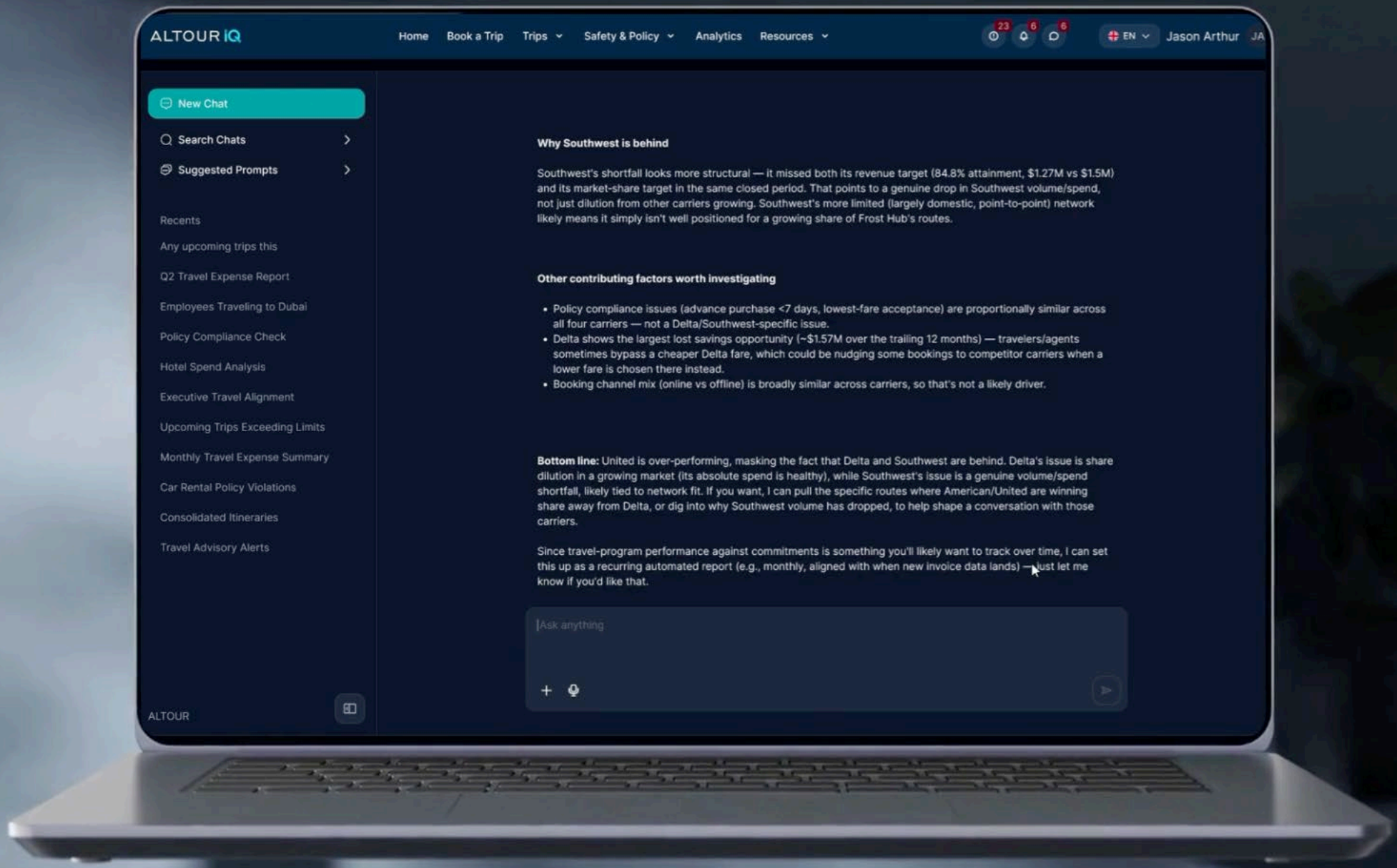
Why are we behind our airline marketshare commitments?



Anticipate.

See tomorrow
before it happens.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Why Southwest is behind
Southwest's shortfall looks more structural — it missed both its revenue target (84.8% attainment, $1.27M vs $1.5M) and its market-share target in the same closed period. That points to a genuine drop in Southwest volume/spend, not just dilution from other carriers growing. Southwest's more limited (largely domestic, point-to-point) network likely means it simply isn't well positioned for a growing share of Frost Hub's routes.
Other contributing factors worth investigating
Policy compliance issues (advance purchase <7 days, lowest-fare acceptance) are proportionally similar across all four carriers — not a Delta/Southwest-specific issue.
Delta shows the largest lost savings opportunity (~$1.57M over the trailing 12 months) — travelers/agents sometimes bypass a cheaper Delta fare, which could be nudging some bookings to competitor carriers when a lower fare is chosen there instead.
Booking channel mix (online vs offline) is broadly similar across carriers, so that's not a likely driver.
Bottom line: United is over-performing, masking the fact that Delta and Southwest are behind. Delta's issue is share dilution in a growing market (its absolute spend is healthy), while Southwest's issue is a genuine volume/spend shortfall, likely tied to network fit. If you want, I can pull the specific routes where American/United are winning share away from Delta, or dig into why Southwest volume has dropped, to help shape a conversation with those carriers.
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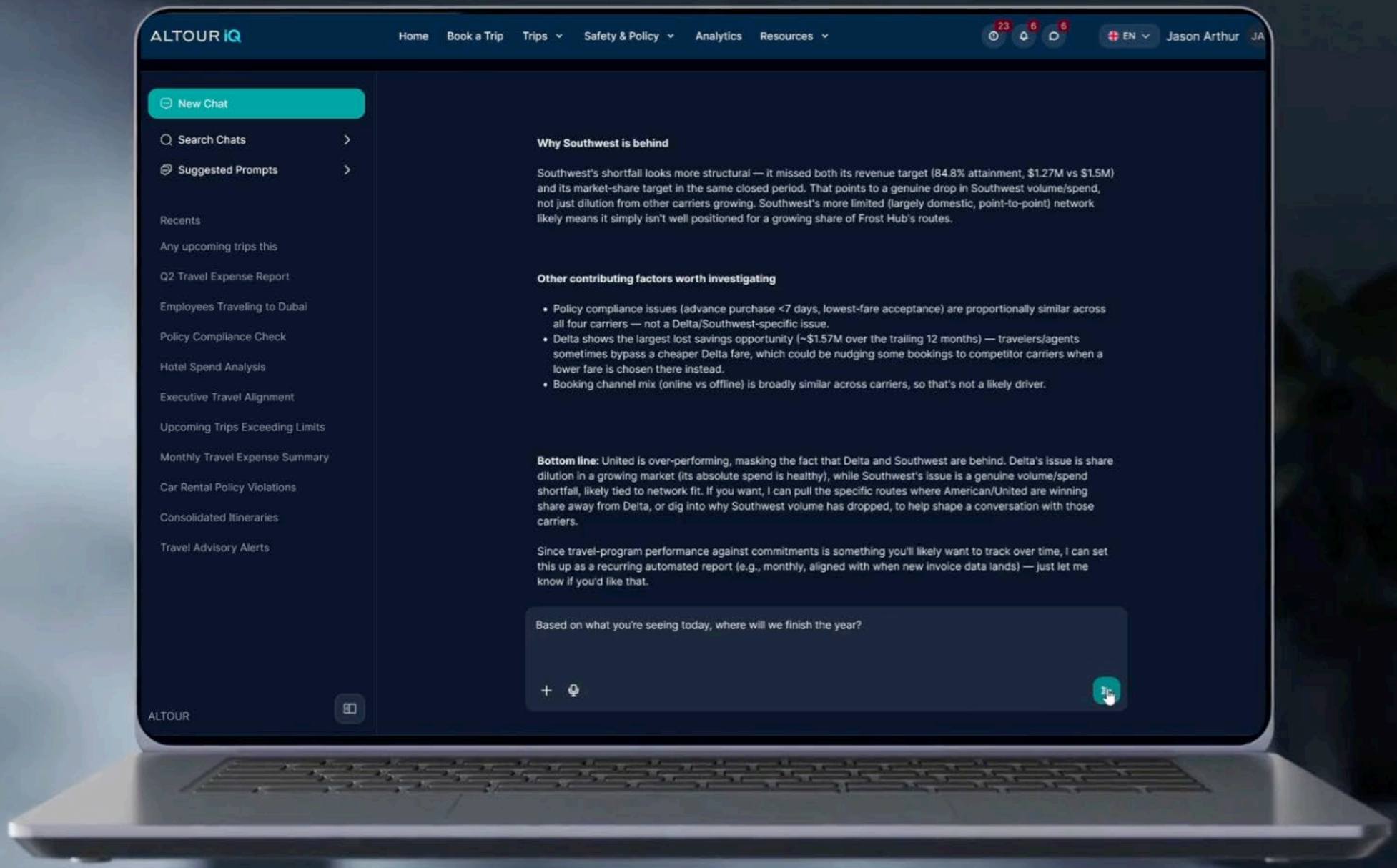
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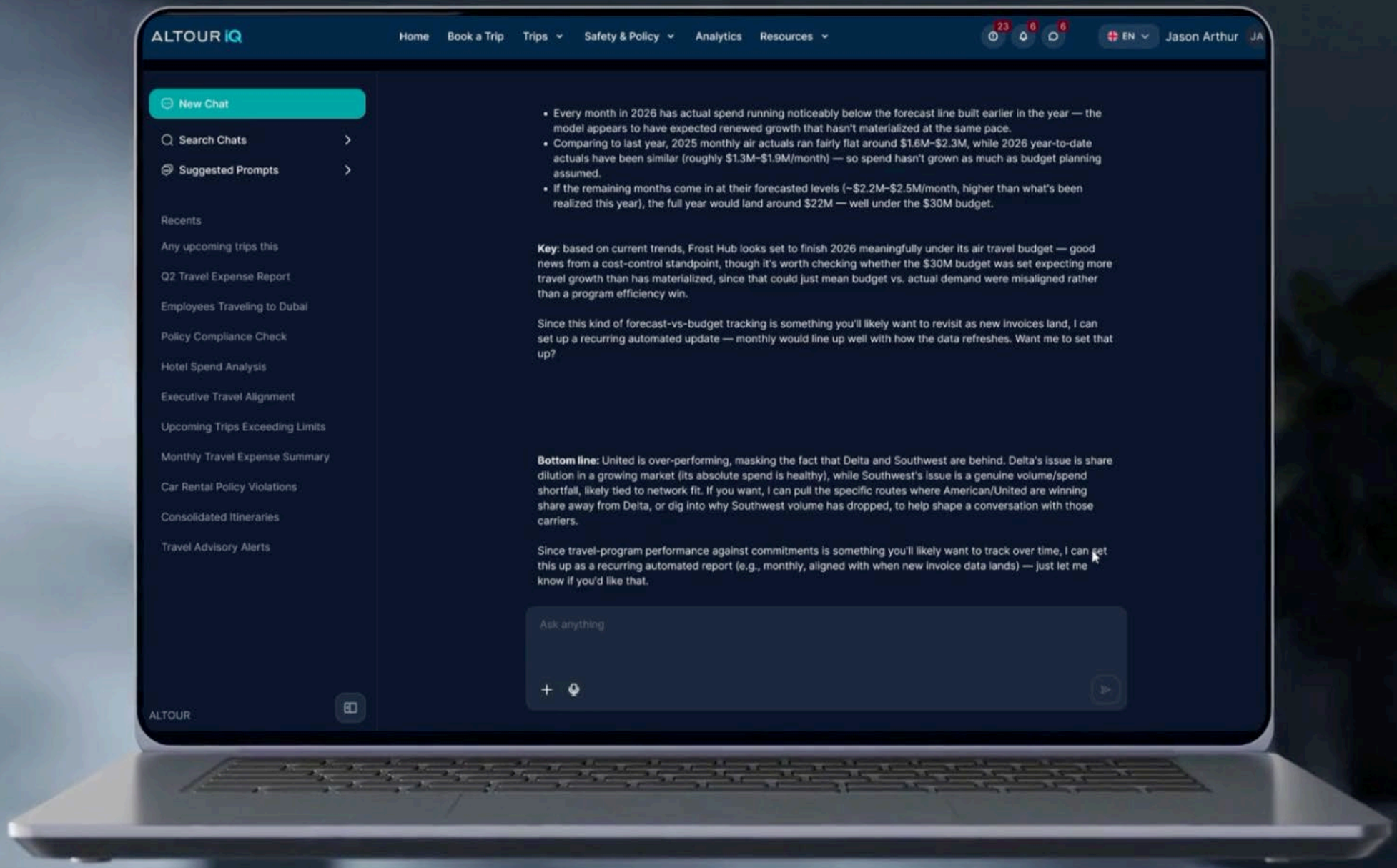
Based on what you're seeing today, where will we finish the year?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• Every month in 2026 has actual spend running noticeably below the forecast line built earlier in the year — the model appears to have expected renewed growth that hasn't materialized at the same pace.
• Comparing to last year, 2025 monthly air actuals ran fairly flat around $1.6M–$2.3M, while 2026 year-to-date actuals have been similar (roughly $1.3M–$1.9M/month) — so spend hasn't grown as much as budget planning assumed.
• If the remaining months come in at their forecasted levels (~$2.2M–$2.5M/month, higher than what's been realized this year), the full year would land around $22M — well under the $30M budget.
Key: based on current trends, Frost Hub looks set to finish 2026 meaningfully under its air travel budget — good news from a cost-control standpoint, though it's worth checking whether the $30M budget was set expecting more travel growth than has materialized, since that could just mean budget vs. actual demand were misaligned rather than a program efficiency win.
Since this kind of forecast-vs-budget tracking is something you'll likely want to revisit as new invoices land, I can set up a recurring automated update — monthly would line up well with how the data refreshes. Want me to set that up?
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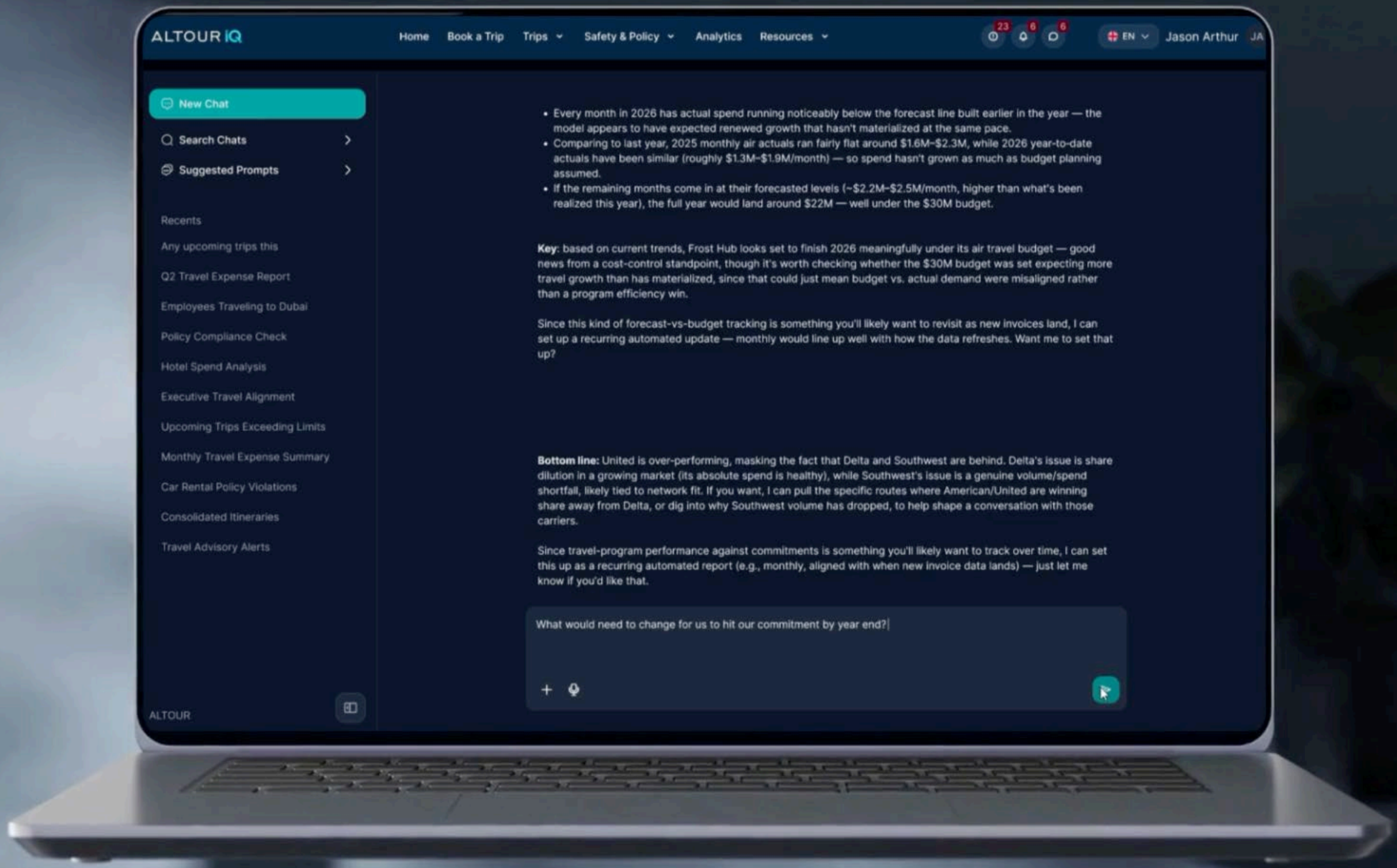
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What would need to change for us to hit our commitment by year end?

CHALLENGE

CHALLENGE

Travel Demand +15%

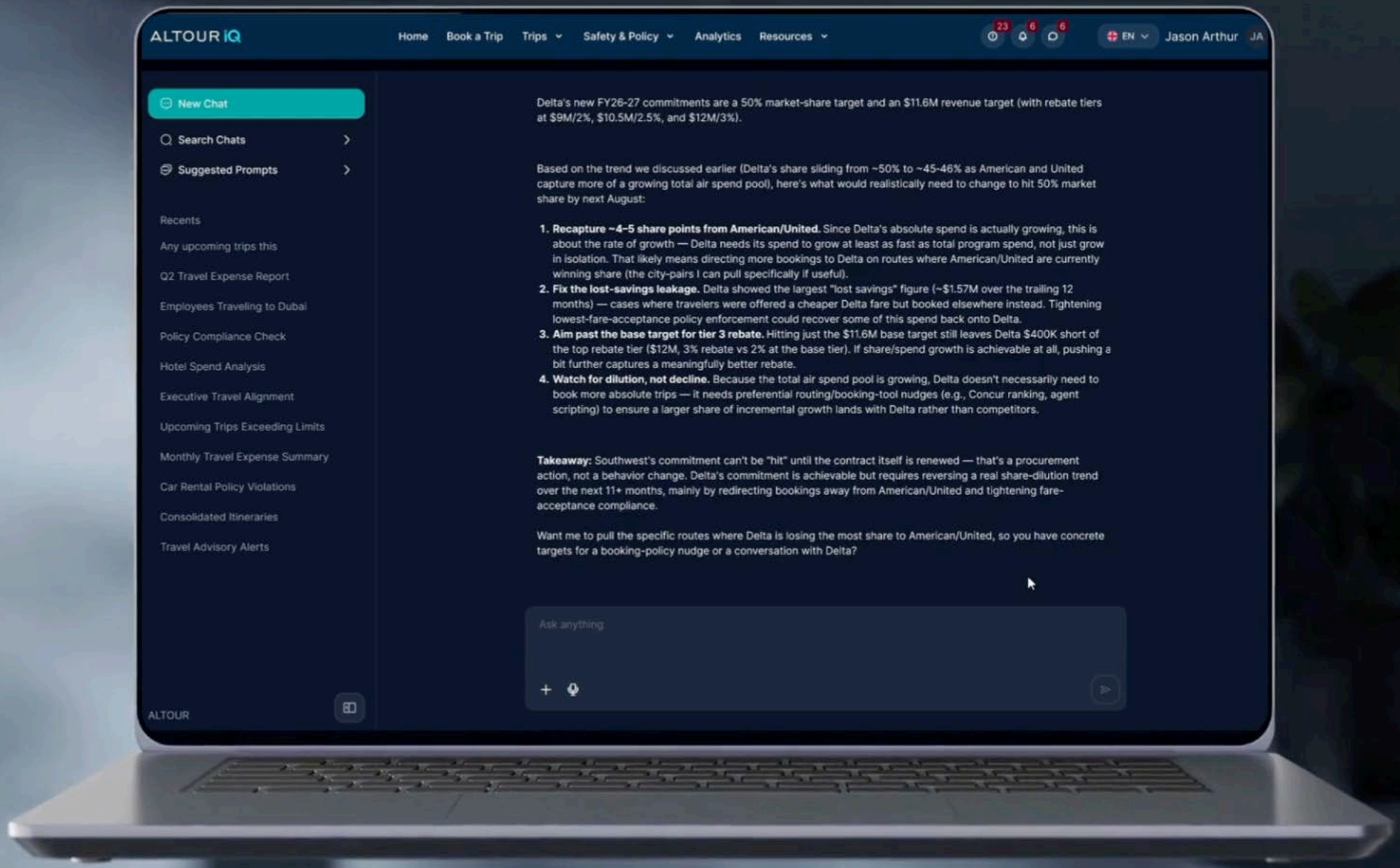
Budget Growth 0%

CHALLENGE

Travel Demand +15%

Budget Growth 0%

Can We Do Both?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Delta's new FY26-27 commitments are a 50% market-share target and an $11.6M revenue target (with rebate tiers at $9M/2%, $10.5M/2.5%, and $12M/3%).
Based on the trend we discussed earlier (Delta's share sliding from ~50% to ~45-46% as American and United capture more of a growing total air spend pool), here's what would realistically need to change to hit 50% market share by next August:
1. Recapture ~4–5 share points from American/United. Since Delta's absolute spend is actually growing, this is about the rate of growth — Delta needs its spend to grow at least as fast as total program spend, not just grow in isolation. That likely means directing more bookings to Delta on routes where American/United are currently winning share (the city-pairs I can pull specifically if useful).
2. Fix the lost-savings leakage. Delta showed the largest "lost savings" figure (~$1.57M over the trailing 12 months) — cases where travelers were offered a cheaper Delta fare but booked elsewhere instead. Tightening lowest-fare-acceptance policy enforcement could recover some of this spend back onto Delta.
3. Aim past the base target for tier 3 rebate. Hitting just the $11.6M base target still leaves Delta $400K short of the top rebate tier ($12M, 3% rebate vs 2% at the base tier). If share/spend growth is achievable at all, pushing a bit further captures a meaningfully better rebate.
4. Watch for dilution, not decline. Because the total air spend pool is growing, Delta doesn't necessarily need to book more absolute trips — it needs preferential routing/booking-tool nudges (e.g., Concur ranking, agent scripting) to ensure a larger share of incremental growth lands with Delta rather than competitors.
Takeaway: Southwest's commitment can't be "hit" until the contract itself is renewed — that's a procurement action, not a behavior change. Delta's commitment is achievable but requires reversing a real share-dilution trend over the next 11+ months, mainly by redirecting bookings away from American/United and tightening fare-acceptance compliance.
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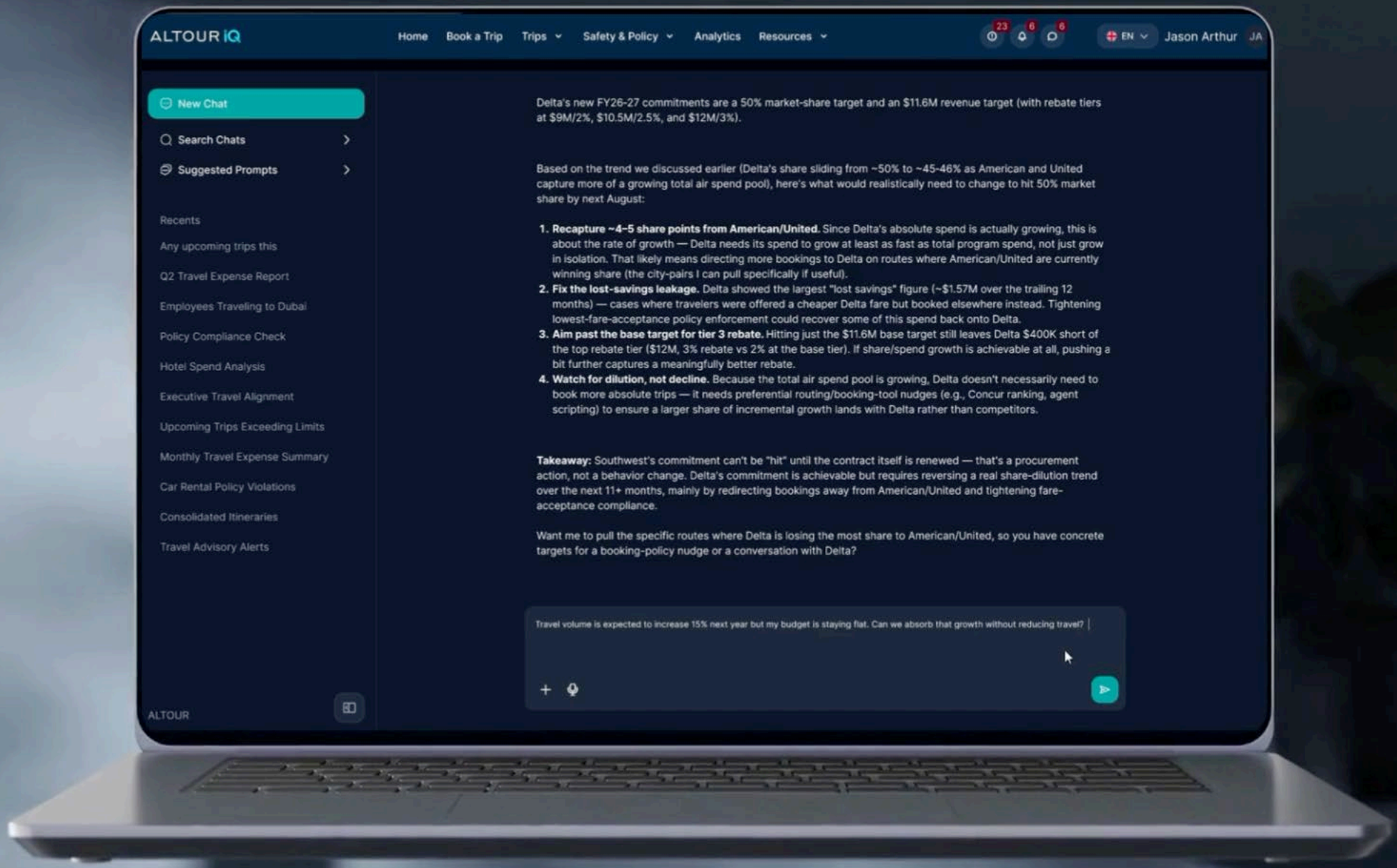
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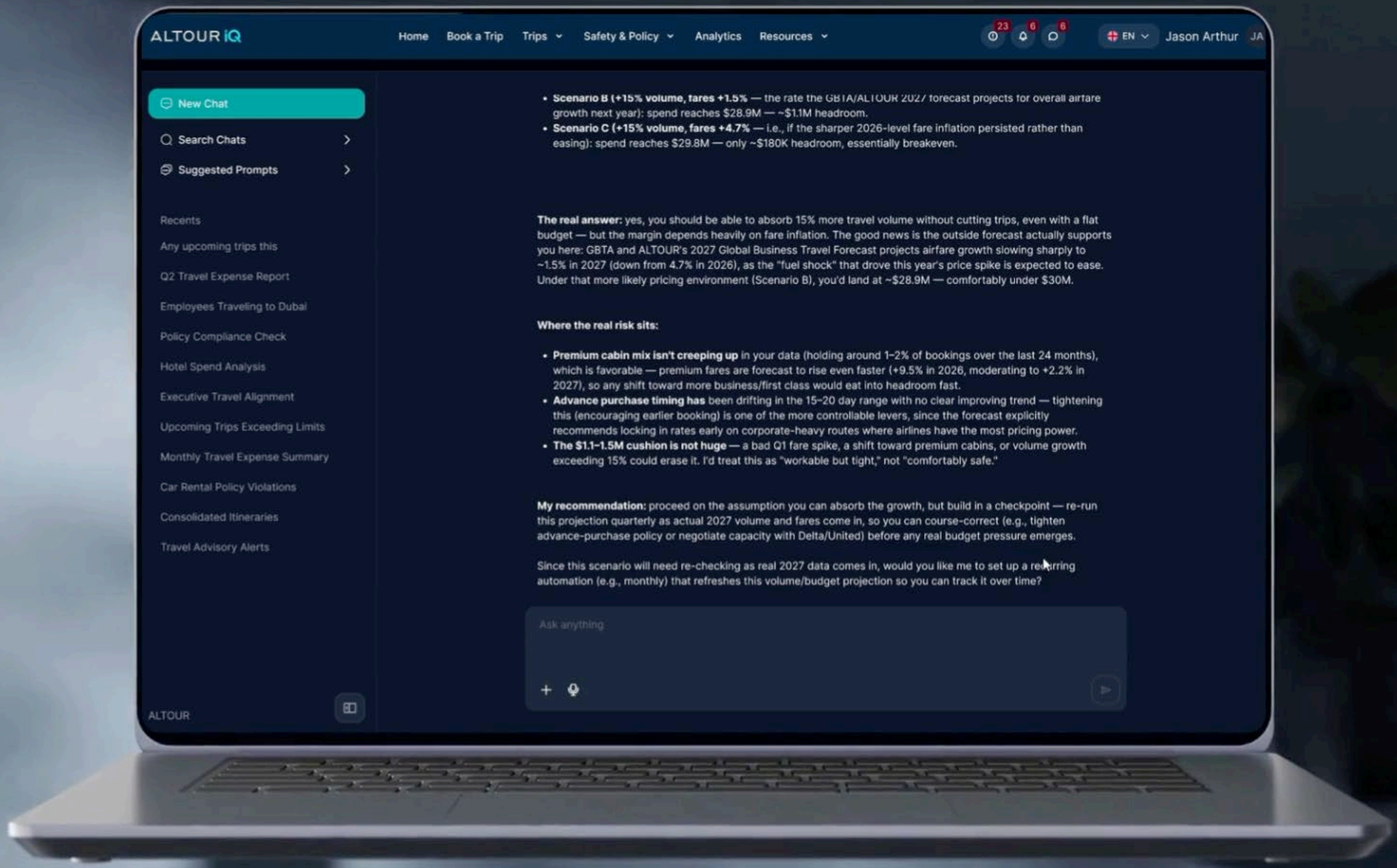
Want me to pull the specific routes where Delta is losing the most share to American/United, so you have concrete targets for a booking-policy nudge or a conversation with Delta?
Travel volume is expected to increase 15% next year but my budget is staying flat. Can we absorb that growth without reducing travel?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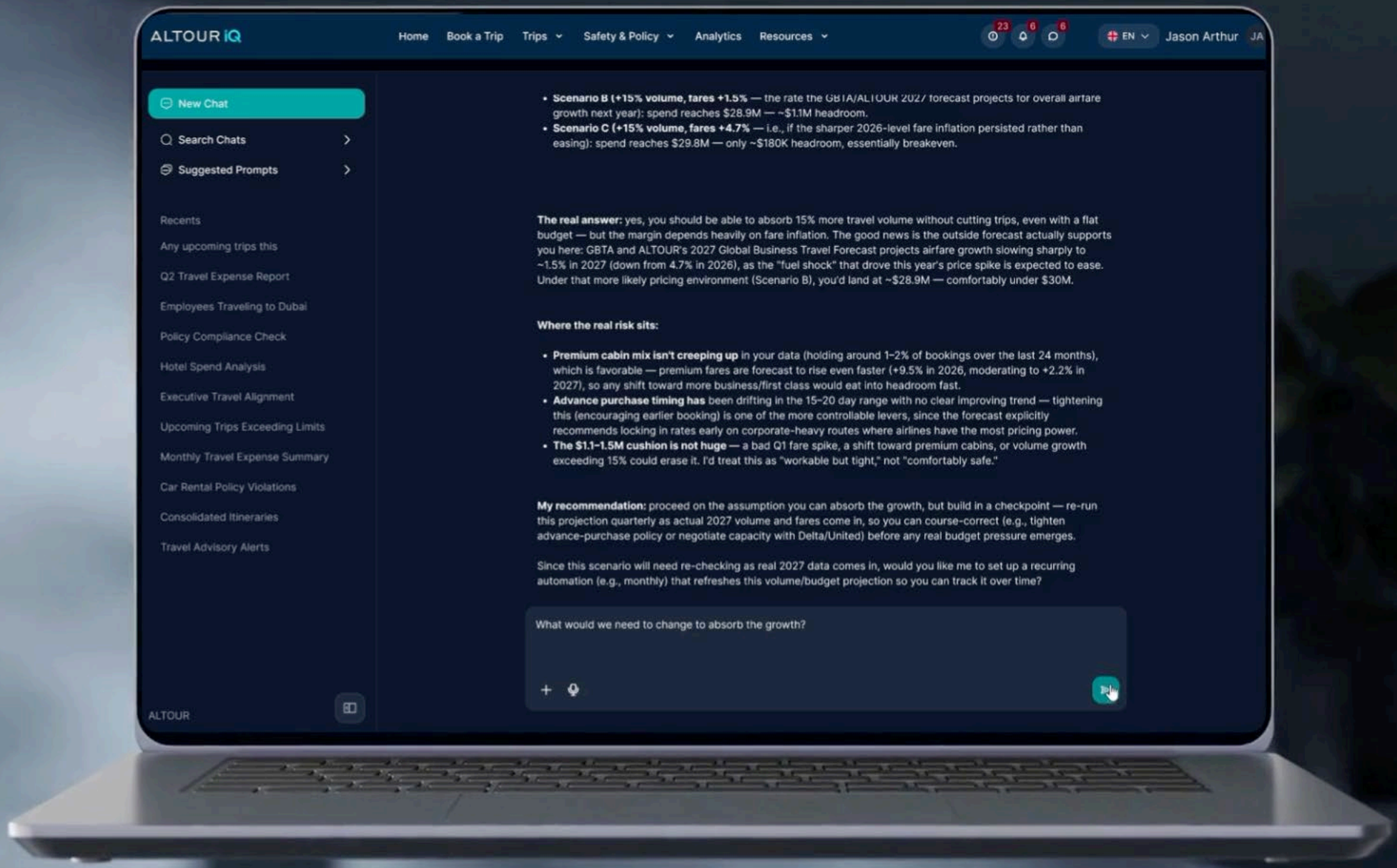
• Scenario B (+15% volume, fares +1.5% — the rate the GBTA/ALTOUR 2027 forecast projects for overall airfare growth next year): spend reaches $28.9M — ~$1.1M headroom.
• Scenario C (+15% volume, fares +4.7% — i.e., if the sharper 2026-level fare inflation persisted rather than easing): spend reaches $29.8M — only ~$180K headroom, essentially breakeven.
The real answer: yes, you should be able to absorb 15% more travel volume without cutting trips, even with a flat budget — but the margin depends heavily on fare inflation. The good news is the outside forecast actually supports you here: GBTA and ALTOUR's 2027 Global Business Travel Forecast projects airfare growth slowing sharply to ~1.5% in 2027 (down from 4.7% in 2026), as the "fuel shock" that drove this year's price spike is expected to ease. Under that more likely pricing environment (Scenario B), you'd land at ~$28.9M — comfortably under $30M.
Where the real risk sits:
• Premium cabin mix isn't creeping up in your data (holding around 1–2% of bookings over the last 24 months), which is favorable — premium fares are forecast to rise even faster (+9.5% in 2026, moderating to +2.2% in 2027), so any shift toward more business/first class would eat into headroom fast.
• Advance purchase timing has been drifting in the 15–20 day range with no clear improving trend — tightening this (encouraging earlier booking) is one of the more controllable levers, since the forecast explicitly recommends locking in rates early on corporate-heavy routes where airlines have the most pricing power.
• The $1.1–1.5M cushion is not huge — a bad Q1 fare spike, a shift toward premium cabins, or volume growth exceeding 15% could erase it. I'd treat this as "workable but tight," not "comfortably safe."
My recommendation: proceed on the assumption you can absorb the growth, but build in a checkpoint — re-run this projection quarterly as actual 2027 volume and fares come in, so you can course-correct (e.g., tighten advance-purchase policy or negotiate capacity with Delta/United) before any real budget pressure emerges.
Since this scenario will need re-checking as real 2027 data comes in, would you like me to set up a recurring automation (e.g., monthly) that refreshes this volume/budget projection so you can track it over time?
Ask anything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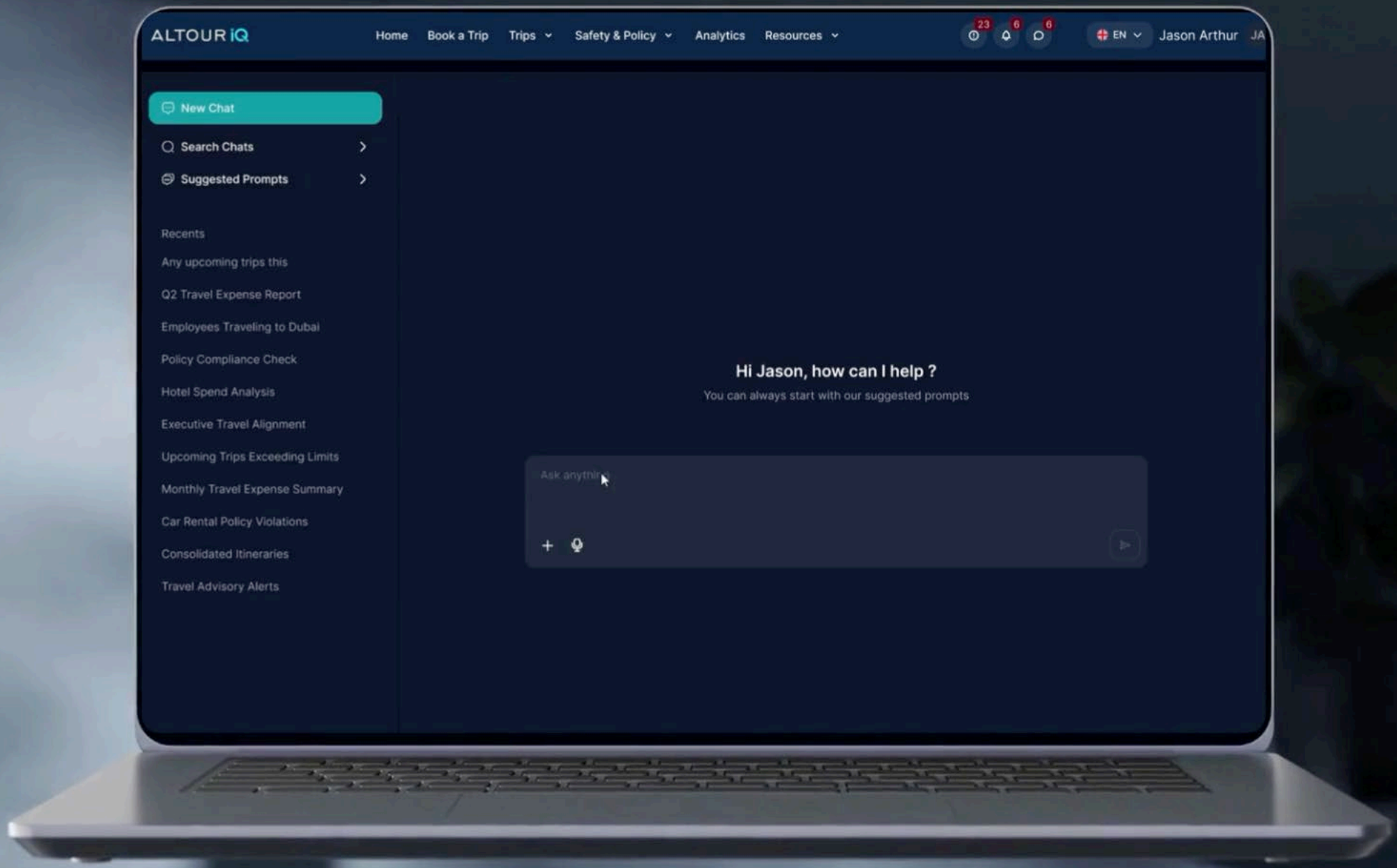
ALTOUR
• Scenario B (+15% volume, fares +1.5% — the rate the GBTA/ALTOUR 2027 forecast projects for overall airfare growth next year): spend reaches $28.9M — ~$1.1M headroom.
• Scenario C (+15% volume, fares +4.7% — i.e., if the sharper 2026-level fare inflation persisted rather than easing): spend reaches $29.8M — only ~$180K headroom, essentially breakeven.
The real answer: yes, you should be able to absorb 15% more travel volume without cutting trips, even with a flat budget — but the margin depends heavily on fare inflation. The good news is the outside forecast actually supports you here: GBTA and ALTOUR's 2027 Global Business Travel Forecast projects airfare growth slowing sharply to ~1.5% in 2027 (down from 4.7% in 2026), as the "fuel shock" that drove this year's price spike is expected to ease. Under that more likely pricing environment (Scenario B), you'd land at ~$28.9M — comfortably under $30M.
Where the real risk sits:
• Premium cabin mix isn't creeping up in your data (holding around 1–2% of bookings over the last 24 months), which is favorable — premium fares are forecast to rise even faster (+9.5% in 2026, moderating to +2.2% in 2027), so any shift toward more business/first class would eat into headroom fast.
• Advance purchase timing has been drifting in the 15–20 day range with no clear improving trend — tightening this (encouraging earlier booking) is one of the more controllable levers, since the forecast explicitly recommends locking in rates early on corporate-heavy routes where airlines have the most pricing power.
• The $1.1–1.5M cushion is not huge — a bad Q1 fare spike, a shift toward premium cabins, or volume growth exceeding 15% could erase it. I'd treat this as "workable but tight," not "comfortably safe."
My recommendation: proceed on the assumption you can absorb the growth, but build in a checkpoint — re-run this projection quarterly as actual 2027 volume and fares come in, so you can course-correct (e.g., tighten advance-purchase policy or negotiate capacity with Delta/United) before any real budget pressure emerges.
Since this scenario will need re-checking as real 2027 data comes in, would you like me to set up a recurring automation (e.g., monthly) that refreshes this volume/budget projection so you can track it over time?
What would we need to change to absorb the growth?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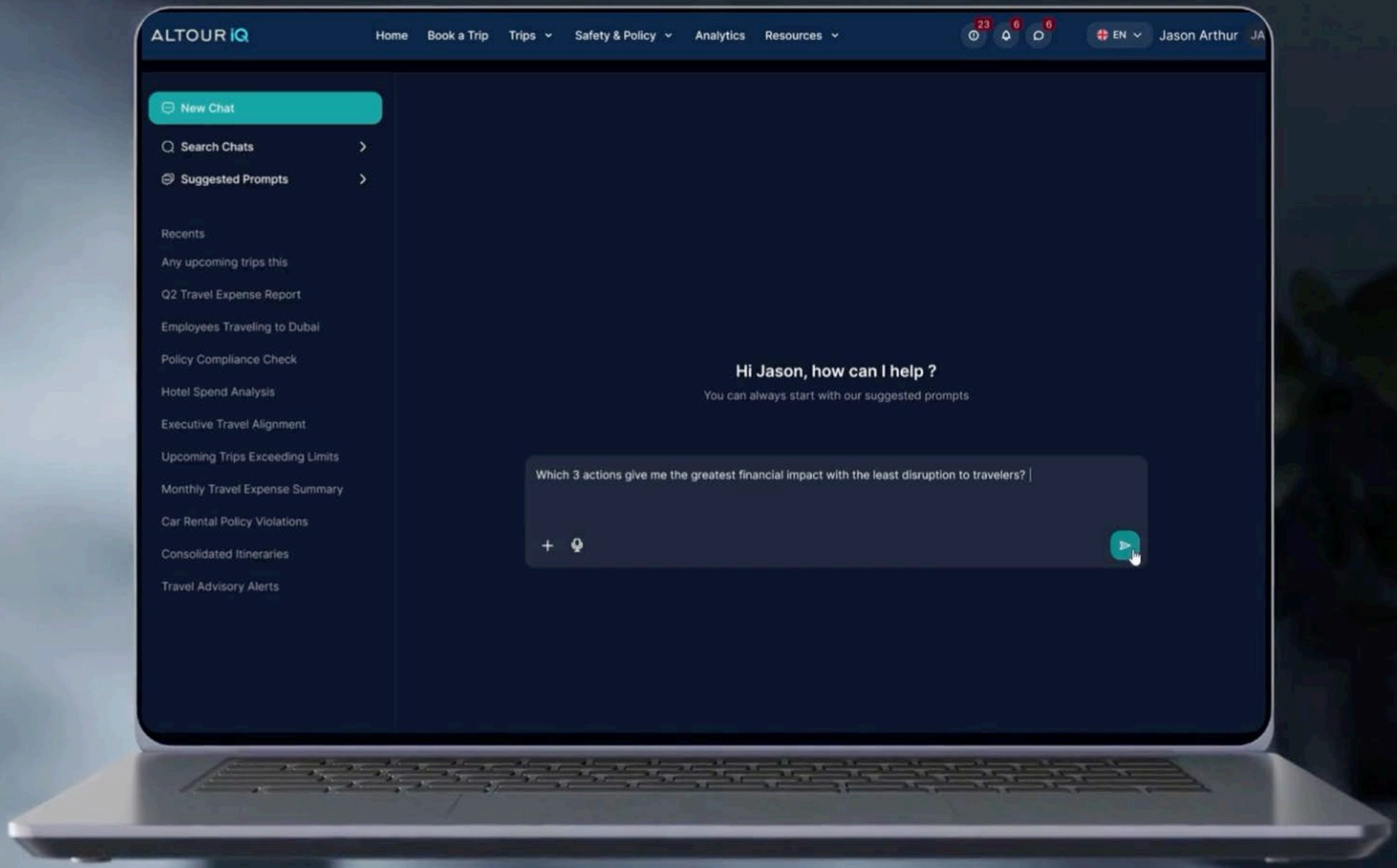
Hi Jason, how can I help ?
You can always start with our suggested prompts
Ask anything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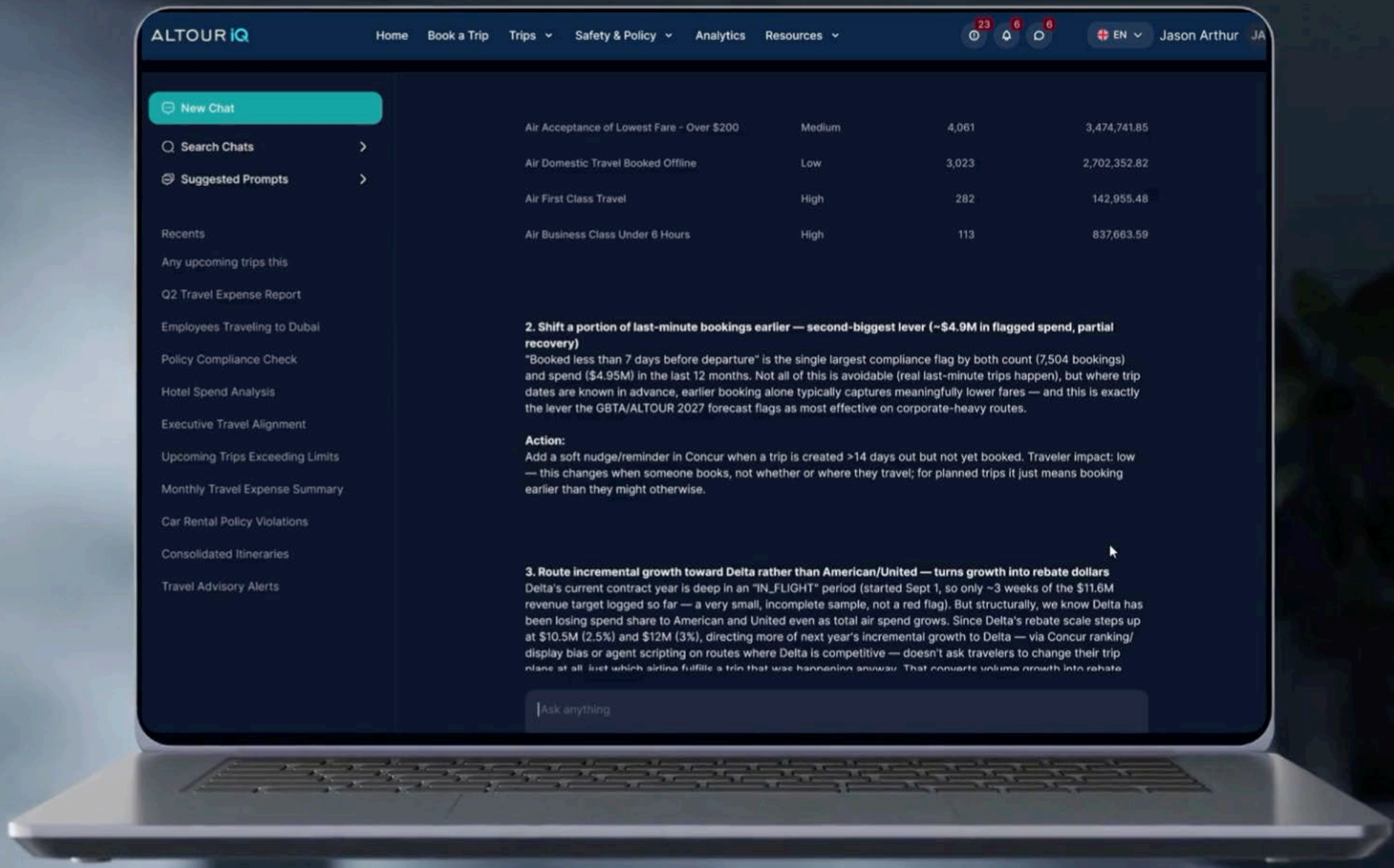
Which 3 actions give me the greatest financial impact with the least disruption to travelers?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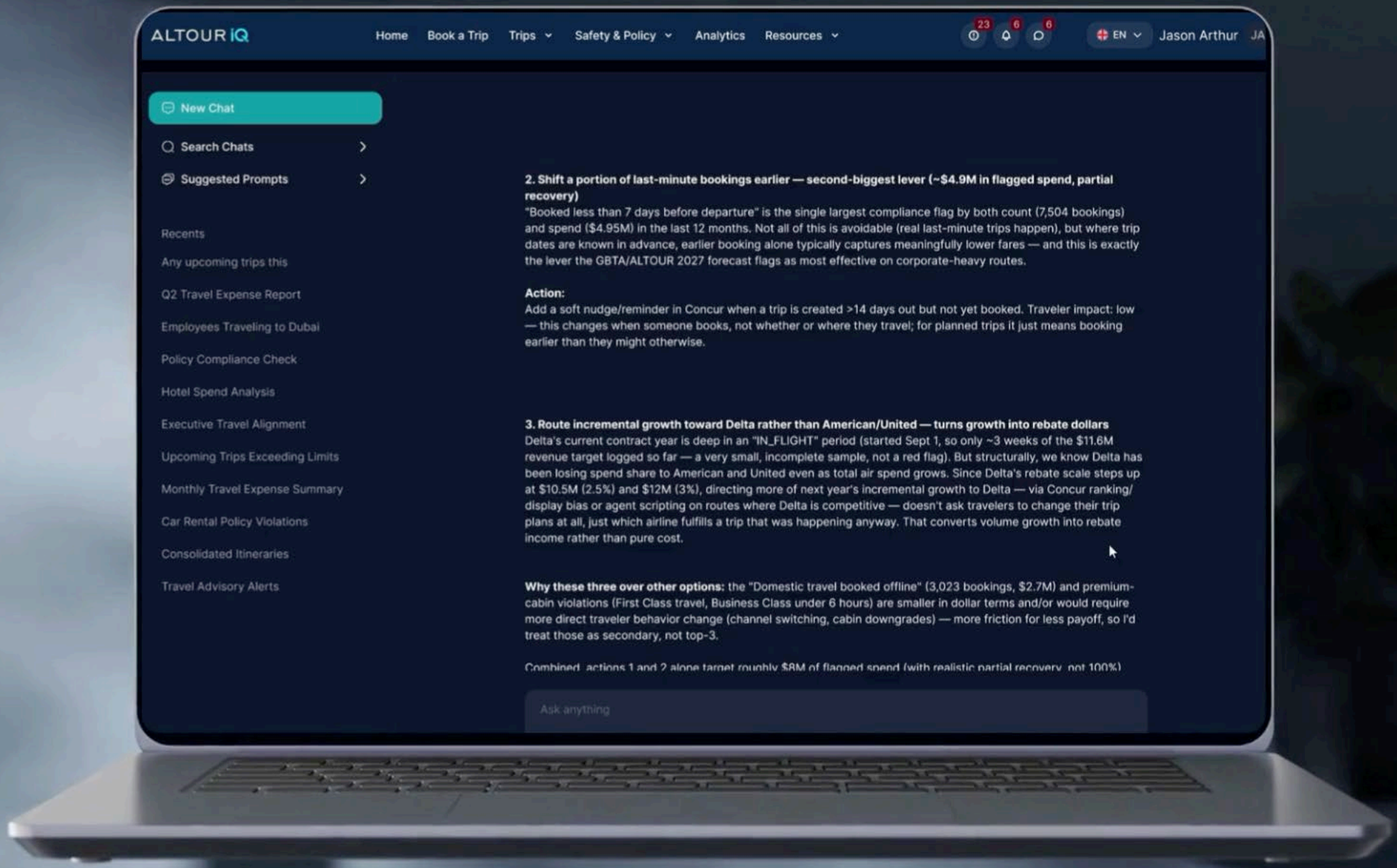
Air Domestic Travel Booked Offline Low 3,023 2,702,352.82
Air First Class Travel High 282 142,955.48
Air Business Class Under 6 Hours High 113 837,663.59
2. Shift a portion of last-minute bookings earlier — second-biggest lever (~$4.9M in flagged spend, partial recovery)
"Booked less than 7 days before departure" is the single largest compliance flag by both count (7,504 bookings) and spend ($4.95M) in the last 12 months. Not all of this is avoidable (real last-minute trips happen), but where trip dates are known in advance, earlier booking alone typically captures meaningfully lower fares — and this is exactly the lever the GBTA/ALTOUR 2027 forecast flags as most effective on corporate-heavy routes.
Action:
Add a soft nudge/reminder in Concur when a trip is created >14 days out but not yet booked. Traveler impact: low — this changes when someone books, not whether or where they travel; for planned trips it just means booking earlier than they might otherwise.
3. Route incremental growth toward Delta rather than American/United — turns growth into rebate dollars
Delta's current contract year is deep in an "IN_FLIGHT" period (started Sept 1, so only ~3 weeks of the $11.6M revenue target logged so far — a very small, incomplete sample, not a red flag). But structurally, we know Delta has been losing spend share to American and United even as total air spend grows. Since Delta's rebate scale steps up at $10.5M (2.5%) and $12M (3%), directing more of next year's incremental growth to Delta — via Concur ranking/ display bias or agent scripting on routes where Delta is competitive — doesn't ask travelers to change their trip
Ask anything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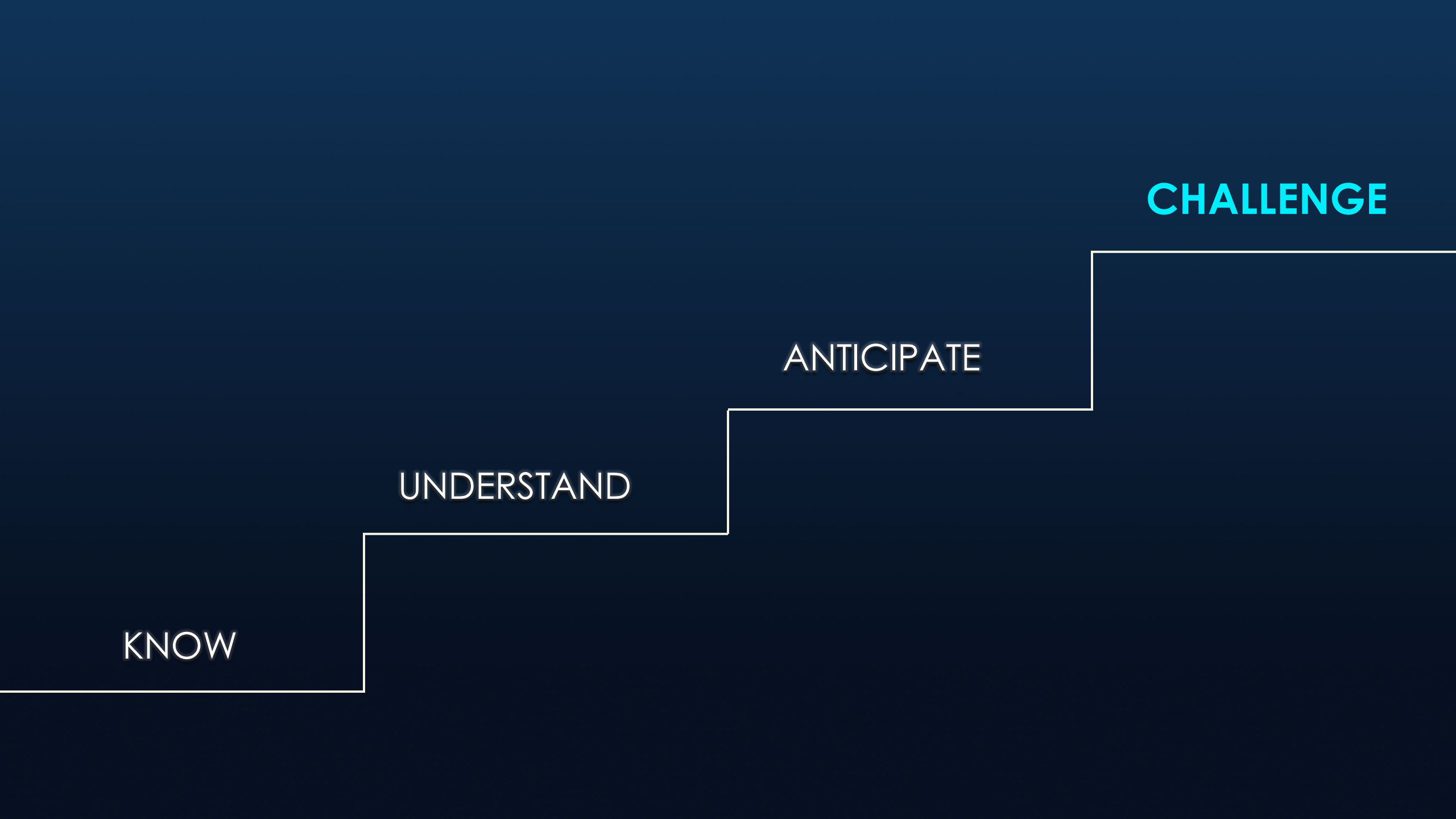
Why these three over other options: the "Domestic travel booked offline" (3,023 bookings, $2.7M) and premium-cabin violations (First Class travel, Business Class under 6 hours) are smaller in dollar terms and/or would require more direct traveler behavior change (channel switching, cabin downgrades) — more friction for less payoff, so I'd treat those as secondary, not top-3.
Combined, actions 1 and 2 alone target roughly $8M of flagged spend (with realistic partial recovery, not 100%)
Ask anything


CHALLENGE
ANTICIPATE
UNDERSTAND
KNOW


Less Searching.
More Understanding.
Less Reporting.
More Action.


Less Reaction.
More Prediction.
Less Administration.
More Strategy.



From Managing Travel





To Shaping Outcomes.

Don't just report on your travel program.

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Have a conversation with it.