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BUSINESS TRAVEL SHOW EUROPE 2026

BY NORTHSTAR

BTN ACADEMY:

WORKING WITH AIRLINES

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BUSINESS TRAVEL NEWS' LEARNING PROGRAM FOR TRAVEL BUYERS

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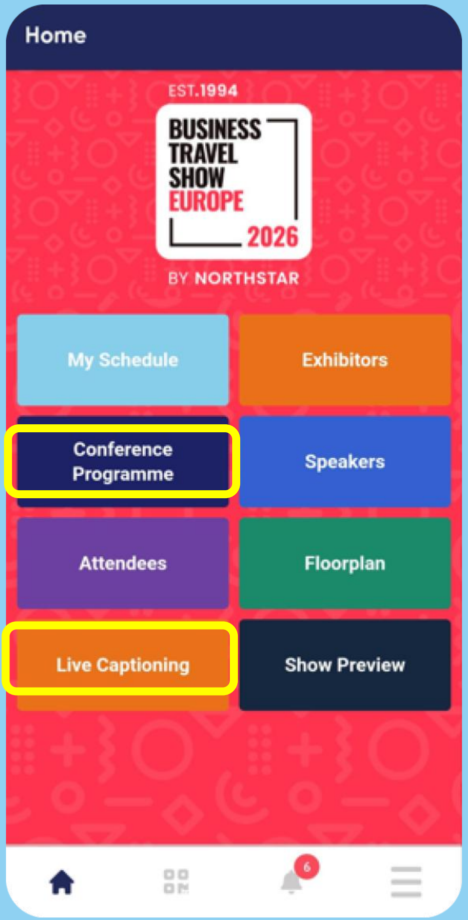
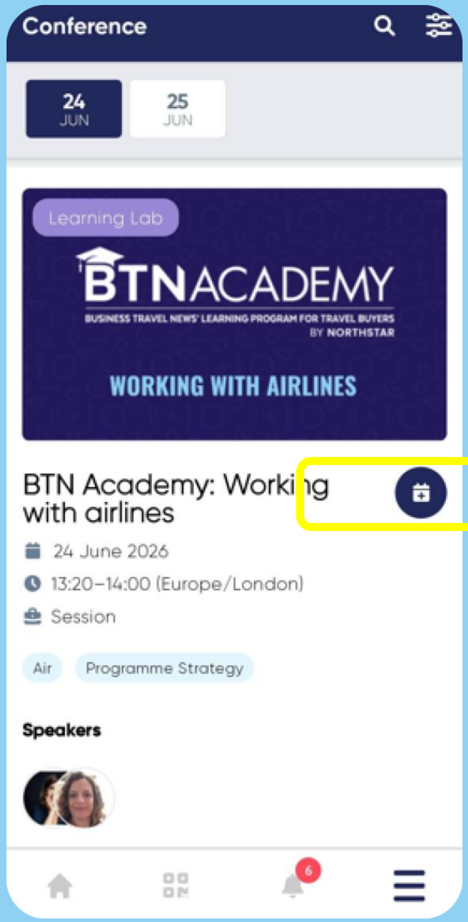
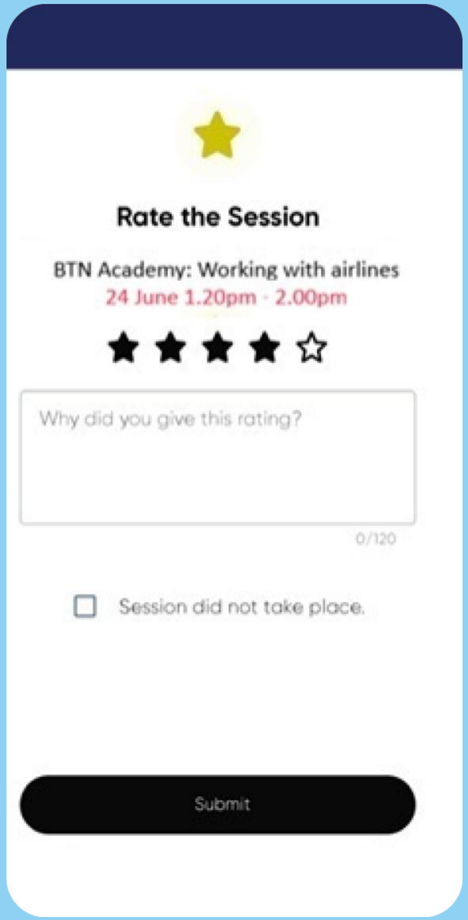
SESSION ESSENTIALS







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The Airline Landscape for Corporate Travel

Airlines

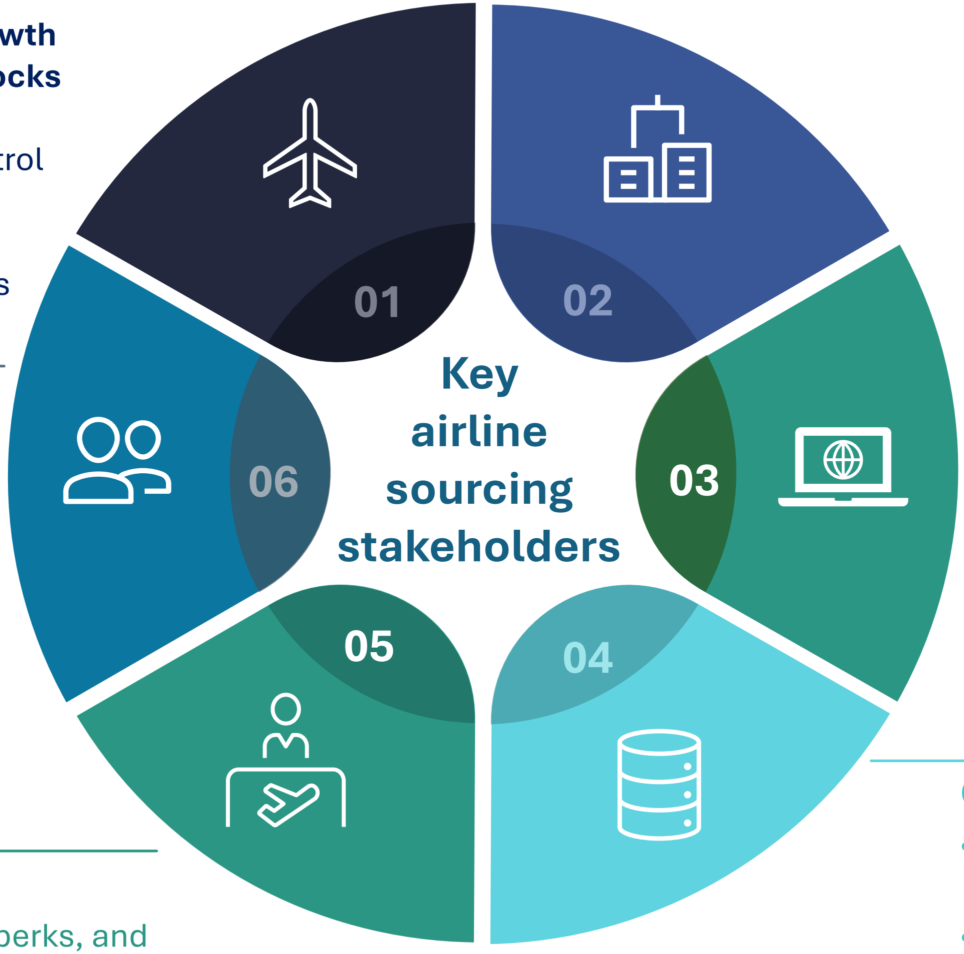
- Prioritising **profitability over pure growth**
- Building resilience to **geopolitical shocks and operational disruptions**
- **Reshaping distribution** to regain control through NDC
- Continuously upgrading **fleets and onboard products** to lift service levels

Corporate Clients

- Balancing **cost control** with duty of care and service quality
- Protecting existing discounts due to **limited negotiation leverage**
- Open to NDC (New Distribution Capability), but constrained by OBT/TMC readiness
- Increasing focus on sustainability, including SAF

Business Travelers

- Influenced by service quality, **loyalty** perks, and personal preference
- Prioritize **schedule, availability, comfort,** and **punctuality**



Travel Agencies

- Still **the gatekeepers for fare loading**
- Must adopt **NDC** to remain competitive long-term
- Able to optimise **complex itineraries and pricing** through offline booking

Online Booking Tools

- Retain client through **content availability** and ancillary visibility
- Heavy **tech investment and TMC partnerships** to stay competitive

GDS Providers

- **Historically the unique way to aggregate and compare airfares**
- **Now under pressure** from airline-led NDC bypass and legacy surcharges
- Rapidly diversifying, including **aggregating NDC content**, to stay relevant

Key Air Market Trends

01 Geopolitics

Ongoing trade tensions and conflicts are driving **operational instability** and **inflation**

02 Supply & Demand

Aircraft supply chain issues: delivery delays (expected to normalize by 2031) and growing distrust in Boeing safety

03 Rising Prices

Jet fuel prices are **up by 77% vs last year's average** due to inflation, demand & supply chain pressure.

04 Airline Expectations

Airlines closely **track share/spend commitments** and **reduce discounts** when targets not met

05 Soft Benefits

Airline contracts no longer include discounts, but also **value adds** to attract travelers

06 Sustainability

Airlines face growing pressure to disclose emissions data and use SAF despite global shortage

Air Sourcing Process

PREPARING FOR YOUR RFP		RUN YOUR RFP		IMPLEMENT & MANAGE

01

Data Collection & RFP Strategy

- Gathering data
- Program Strategy
- Define RFP objectives
- Finding Compatible Airline Partners
- RFP governance

02

RFP Planning & Creation

- RFP pack including introduction and evaluation criteria
- Response Template

03

Suppliers' Evaluation and Negotiations

- Roll-out by round, replicated once or twice depending on the airline.
- Each round includes: Offers' analysis per airlines (pricing, targets, requirements, value add services, sustainability, etc.)
- Requests preparation
- Negotiation meetings

04

Award

- Proposal analysis results
- Share shift scenario
- Suppliers' awarding

05

Contract, Implementation & Maintenance

- Contract checking & signing
- Implementation of the new discounts
- Managing the relationship
- Renegotiations (if needed)

4 to 6 months

Preparing for your Air RFP

Understand your Airline Program Economics

- Airline agreements are based on:
    - Can you commit on market shares?
    - What are your steering capabilities?
    - Are your routes competitive or captive?

Estimate Air Volume – past and future

- Is your spend about to grow or decrease? What are the business growth plans?
- Are you flying domestic, European or long-haul routes?

Understand Traveler Behaviour

- What are your traveler loyalty & booking habits?
- What are your travelers' needs in terms of flexibility, ancillary services, schedules?

Identify Corporate Value Drivers

- What are your company’s priorities around cost savings, sustainability, productivity, safety and security?

Gathering and leveraging data for a Successful Airline Bid

Core Data Sources

- **TMC reports – Yes!**
- Nice to have:
  - Airline reports
- Less critical:
  - OBT data
  - Corporate card data
  - Expense reporting systems

Key Data Points for Negotiations

The fields you will need:

- Origin
- Destination
- Carrier
- Booking class
- Fare basis

The **timeframe** needed:

- 12 months critical
- 24 months better

Analyze Travel Patterns

Check:

- Top city pairs
- Ticket share evolution
- Spend by carrier
- cabin class usage
- Average ticket prices fluctuations
- Growing or declining markets
- Changing traveler behavior

Analyze Market Conditions

Research:

- Airline capacity and load factors evolution
- Airline NDC readiness
- Route competition changes
- On-time performance issues
- New projects/office locations driving volumes in your company

Finding Compatible Airline Partners

After understanding company's travel patterns, the **key criteria** to assess when selecting airlines are:

- Current spend
- Future spend
- Contract savings
- Commercial relationships

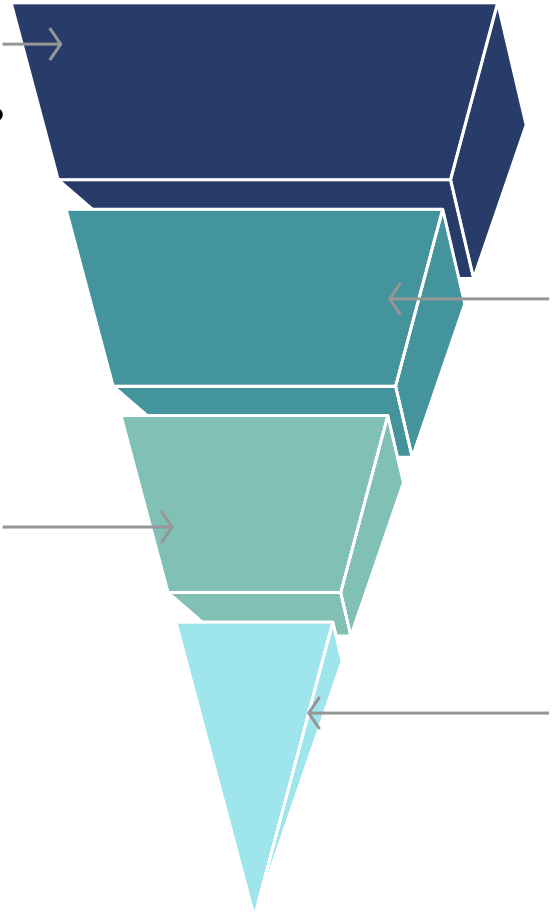
You will negotiate with airlines, but also with **Joint Ventures (JVs)** which share pricing strategies and contract together. They will be key on your transatlantic routes:

STAR ALLIANCE
UNITED
Lufthansa
AIR CANADA

SKYTEAM
DELTA
AIRFRANCE
KLM
virgin atlantic

oneworld
American Airlines
BRITISH AIRWAYS
IBERIA

Structuring your Air RFP



1. Define Contract Structure

- What **period** do you need (2 or 3 years)?
- Will you harmonize the contracts **end dates**?
- Who owns the **legal template -** you or the airline?
- Are you going for **global, regional, and/or local** sourcing?

2. Identify your sourcing process

- What will your **key selection criteria** be? savings, CO_2 impact, product, or others
- Will you adopt a **preferred carrier**, **Lowest Logical Fare**, or **sole-carrier strategy**
- What will be your **governance** to award your airline partners?

3. Build Fare & Coverage Strategy

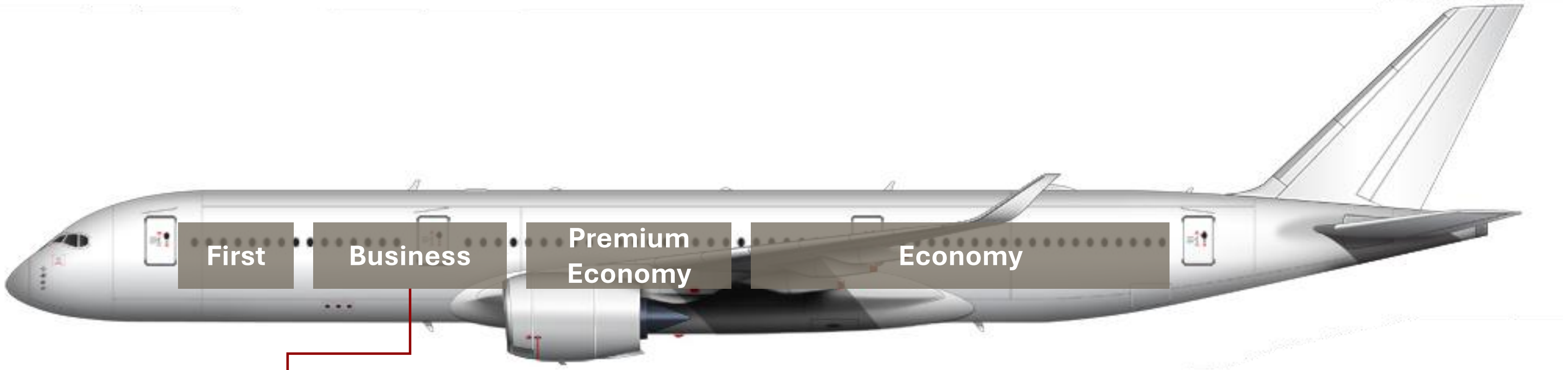
- Do you need **Point of Origin** coverage?
- Can you get fixed fares on top of discount %?
- Would you accept challenging **targets** against best-in-class conditions?

4. Prepare for Supplier Engagement

- Can you truly **deliver** on what you **promise** to airlines?
- Are you **flexible** with **timing** and negotiation iterations?
- Will you **share** spend **data**, ATP fare competitiveness information to support airlines pricing team?

Do you know how airline pricing works?

Cabins



Booking classes

J	6 000 €
C	5 000 €
D	4 000 €
I	3 000 €
Z	2 000 €

- **3 to 15 booking classes** per cabin class.
- Published airfares **change 1 to 4 times a year**
- Each airline manages its own booking classes inventory

Fare basis

J1UKJB
J2BA
JBGB
JIM
JFFAFR

- **5 to 20 fare basis** per booking class.
- A fare basis is a subset of a booking class, with its **own price and flexibility conditions.**
- Airlines customize their published and corporate fare basis, starting with the booking class letter, and including variables like seasonality, minimum stay, etc.

What aspects of the airline deal can be negotiated?

Net Ticket Price

Negotiating the price can involve
Upfront discount % or fixed fares based on published fares.
(Zoning, carve-outs, SOTO, etc.)

Targets

Negotiating targets can include revenue share, segment share, or route-level goals.

Value-Added Services

Negotiating soft funds, services can include seat selection, lounge access, or Wi-Fi, frequent flyer cards, waiving fees, etc.

Rebates

Negotiating rebates can be performance-linked or back-end.

What aspects of the airline deal are hard to get?

Taxes or Surcharges

Monopolistic Routes

Offset published fare inflation

Most restrictive fares and last seat available classes.

Soft Benefits to Consider

1

Traveler Comfort & Experience
Lounge access, priority boarding, preferred seating, complimentary upgrades, extra baggage allowance, Wi-Fi vouchers, fast-track security

2

Service & Support Enhancements
Priority reaccommodation during disruptions traveler support desk, unused ticket management

3

Flexibility & Policy Exceptions
Name-change waivers, flexible ticket changes, cancellation flexibility, same-day flight changes, ticket validity extensions

4

Strategic & Program Value Benefits
Elite status matches, status fast-track programs, traveler engagement events, personal travel discounts,

Soft-dollar benefits in airline contracts may not directly reduce ticket prices, but they create significant value – as long as they are a real value-add, not a market standard

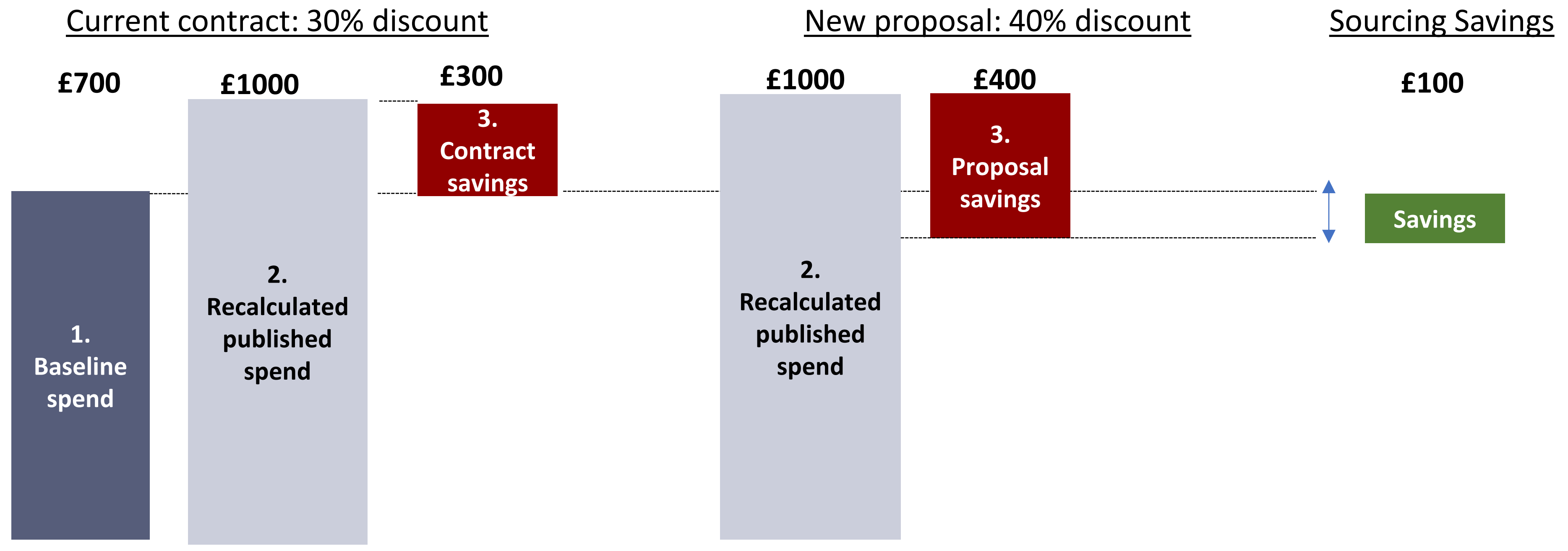
RFP Package Building : List of Documents

	Objective	Format recommended
Company description	Present company's profile and detail RFP objectives, priorities and context.	Word or Excel
Instructions	Present RFP guidelines and timeline.	World or excel
Spend information	Give airlines the most recent and accurate spend information.	Excel
Pricing & targets	Collect pricing and targets in a standard format (GBTA).	Excel
Requirements	List of qualitative questions to determine airline's capabilities to meet your needs.	Excel
Value add services	List of expected soft benefits.	Excel
Sustainability	List of questions to assess airlines' level of maturity on the sustainability topic.	Excel

How do we calculate savings for air?

Airlines offer discounts, so the first step is to calculate the contract savings! Then only they can be compared to the new proposal savings.
This exercise has to be done on a POS/POO/Origin/Destination/Carrier/Booking Class level

Air savings methodology



Managing the Airline Relationship

Communicate Preferred Airlines to Travelers

Promote preferred airlines through:

- Travel policy communication,
- Booking tool configurations,
- Training sessions.

Align with the TMC

Work closely with the travel management company to:

- Ensure fares are filed correctly,
- Audit booking behavior,
- Implement reporting processes.

Monitor Program Performance

Travel managers should track:

- Share commitments,
- Fare savings,
- Booking compliance.

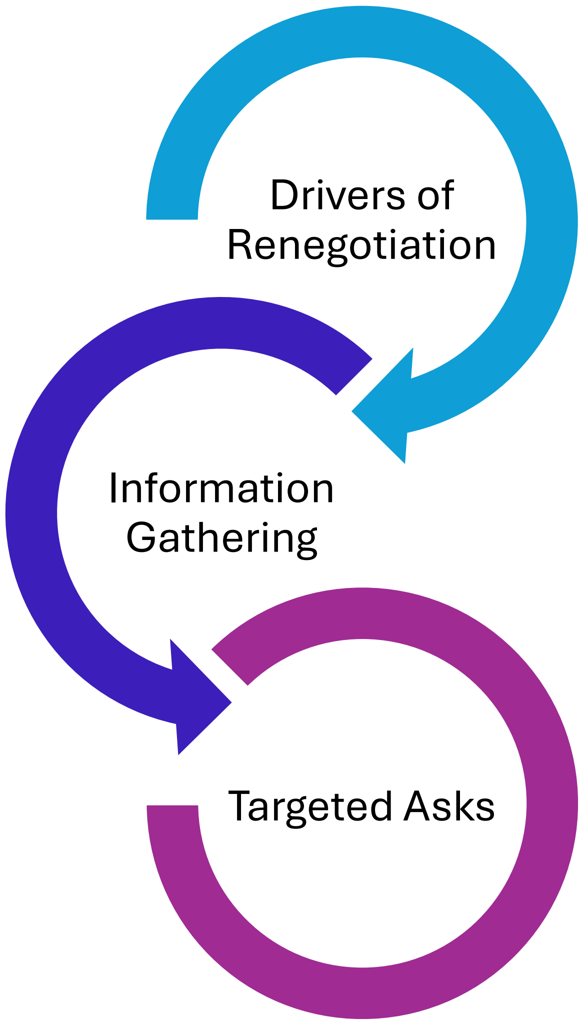
Conduct Regular Airline Reviews

Regular supplier meetings help review performance and resolve issues.

Collect Traveller Feedback

Traveler feedback can reveal service issues and airline performance concerns.

Renegotiating or Adjusting Airline Deals



Key Drivers of Renegotiation

Renegotiation may be needed when:

- Travel patterns change
- Contract targets are exceeded
- Airline competition shifts

Information Required to Renegotiate

Use KPIs such as **market share**, **ATP competitiveness**, and stakeholder feedback on **content**, **service reliability**, **operational issues**, and **traveller satisfaction**

Focus on Targeted Asks

- Use the collected data to run a **root-cause analysis** and target problem areas
- Prioritise **high-volume or high-cost routes**, adjust for **changing traveller needs**, and lower targets on **underperforming routes**

Conclusion: Building a Strategic Airline Program

01 Strong Understanding of the needs of the program

02 Inputs from local stakeholders

03 Robust data to support the program

04 Keeping in mind the suppliers' perspective

05 Robust KPIs & reviews with suppliers