

# Ahead of the curve: Future-proofing travel programmes

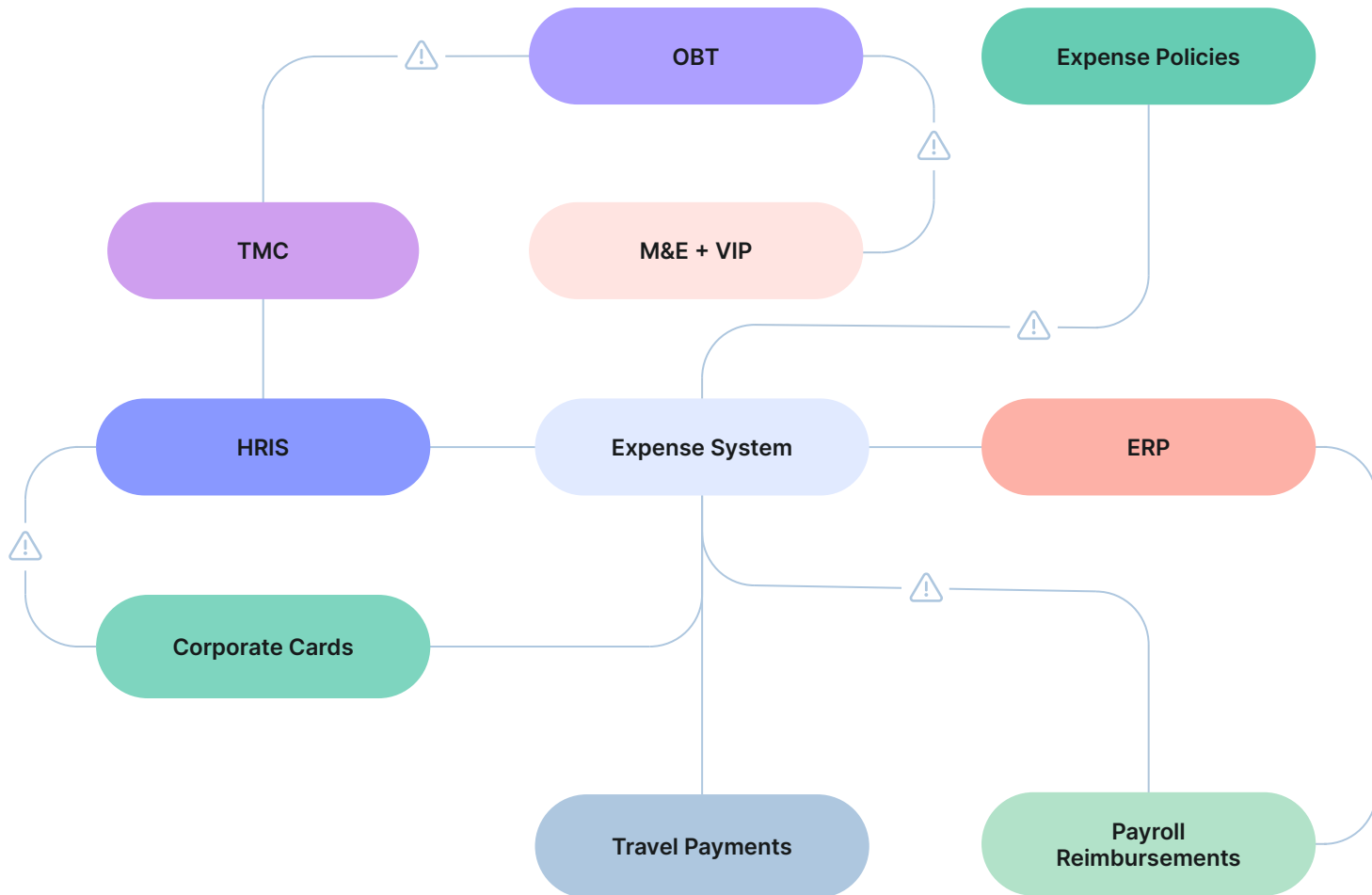


**Michael Riegel**  
CEO, EMEA

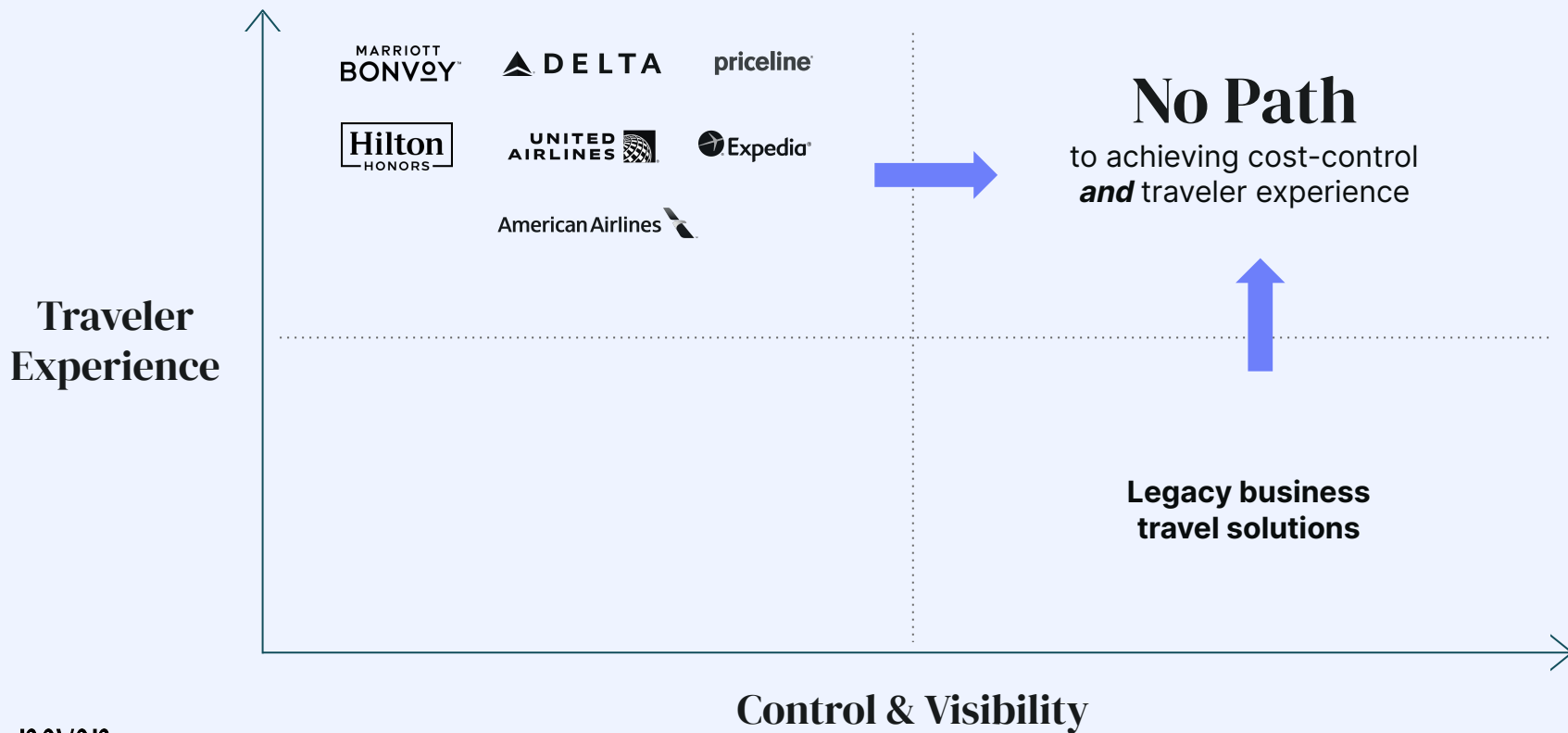
**Today's employees  
expect convenience,  
personalisation, and  
ease of use.**



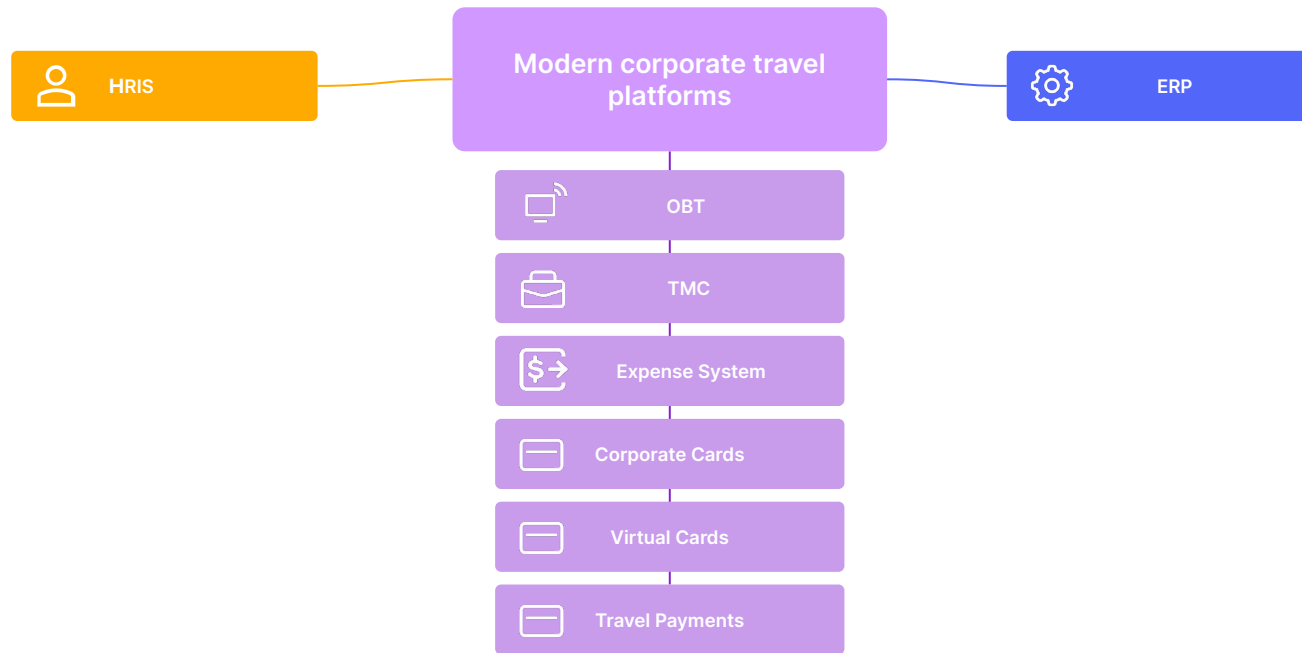
**Fragmented,  
siloes, and  
inefficient  
technology  
stacks.**



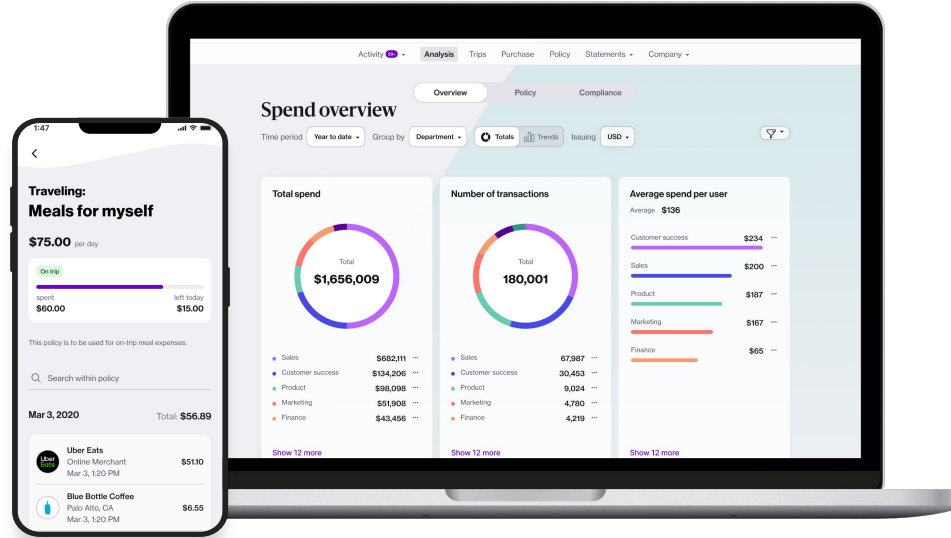
# A forced tradeoff: cost control at the expense of user experience



## End-to-end consolidation & automation



# It all starts with the users (all of them)



50  
NPS

90%  
CSAT

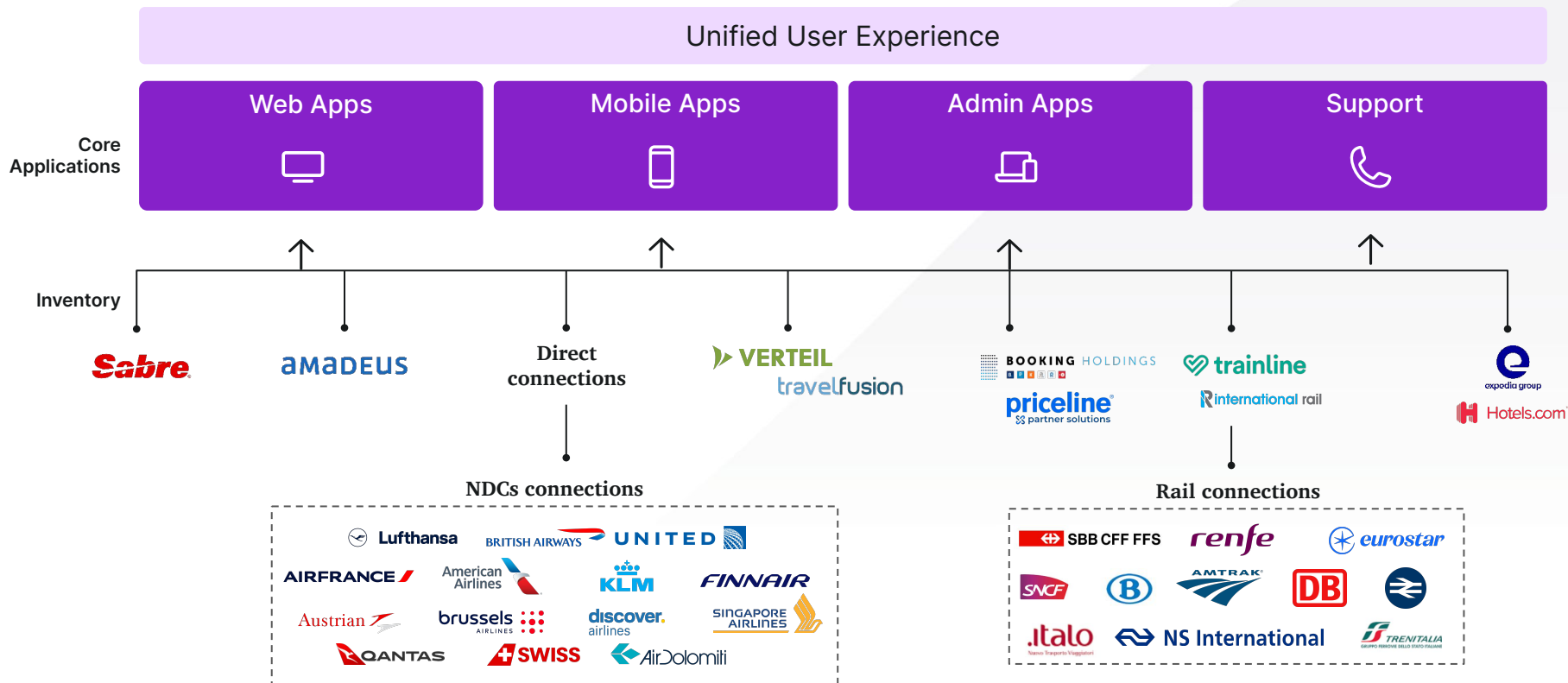
Full Adoption ❤️ leads to →

Full Visibility 👁️ leads to →

Full Control 🔒 leads to →

Optimal Savings 💰 leads to →

# Simplifying Business Travel



**So how does this fit into the most common headwind that buyers have at the moment?**

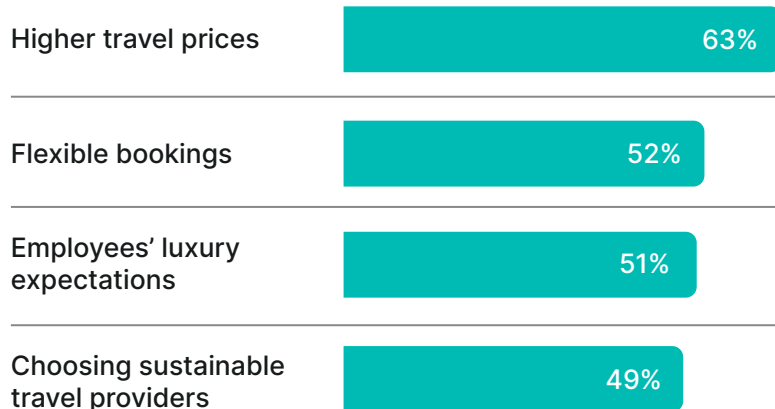


**Savings and  
budget initiatives**

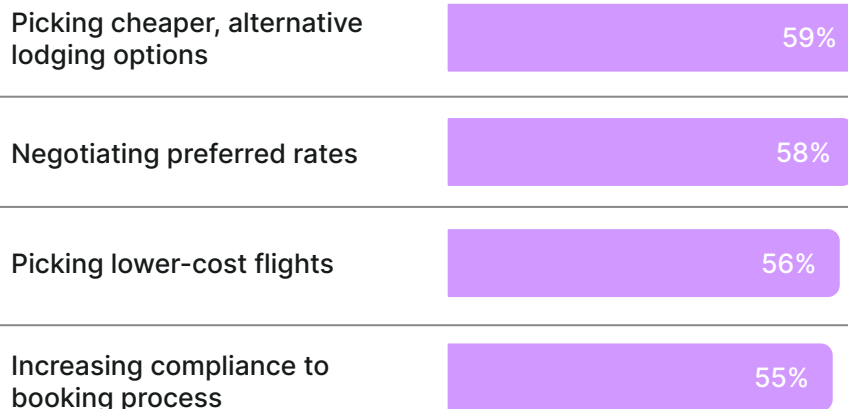


# How travel buyers are dealing with increased costs

## Top factors increasing travel costs



## Top cost-control measures being put in place



# Identifying new savings levers in the face of higher travel prices

## Top factors increasing travel costs

Higher travel prices

63%

## Top cost-control measures being put in place

Picking cheaper, alternative  
lodging options

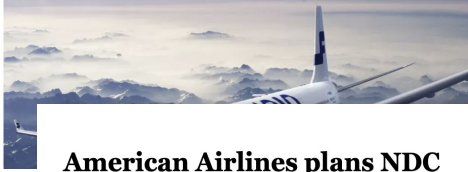
59%

# Navigating an increasingly fragmented distribution landscape

TMC & DISTRIBUTION

## Finnair to introduce continuous pricing and restrict availability of domestic fares

By Rob Gill / 18 January 2023 / Contact Reporter



## American Airlines plans NDC acceleration, saying results are above expectations

By Robert Silk | Jul 31, 2023 | Updated on: Aug 01, 2023



NEWS

## BA Ups GDS Surcharge, Adds New Minimum Requirements For NDC Partners

By Jay Boehmer / January 31, 2023



AVIATION

## Lufthansa's GDS surcharge will be vendor-specific

By Robert Silk | Jul 14, 2023



AVIATION

## Air France-KLM increases GDS surcharge

By Robert Silk | Jun 21, 2023



AVIATION

## United Airlines will pull basic economy fares from legacy GDS

By Thomas H. | Jul 13, 2023



# NDC isn't easy to build...

## LEGACY SYSTEMS

The airline industry relies heavily on complex, deeply entrenched legacy systems, making it difficult for companies to switch to a new protocol like NDC. These complex and long-established systems often form the backbone of airlines' operations, making it challenging for companies to transition to an innovative protocol like NDC. The shift necessitates not only a significant investment of time and resources (the industry will likely need to spend between **\$3 billion and \$15 billion** over the next ten years) but also demands technical expertise to navigate the complexities of integrating NDC with existing systems.

### HIGH INVESTMENT

TMCs will need to invest billions in CAPEX migrating systems

### LOST INCENTIVES

TMCs will need to give up millions in GDS incentives and benefits

### UPSKILLING AGENTS

TMCs will need to train thousands of agents on a new model

# Distribution shifts are making NDC a non-negotiable for travel managers and travellers

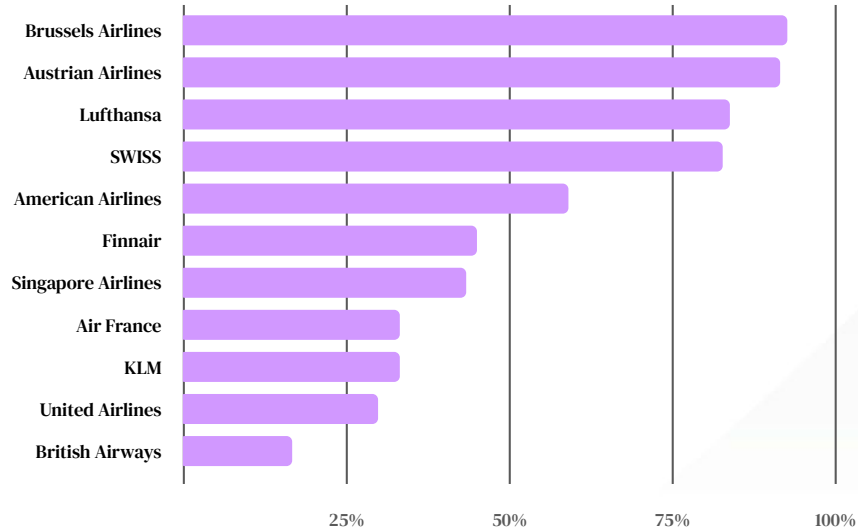
LH 1029 (CDG–FRA), May 7, 10:35  
One-way flight, searched on Apr 16

**Sabre only**

NDC via direct connect

	GDS	NDC	
Eco Light	X	235	-29%
Eco Classic	342	249	-27%
Eco Green	X	279	
Eco Flex	383	300	-22%
Business Saver	X	394	
Business Green	X	444	
Business Flex	468	444	-5%

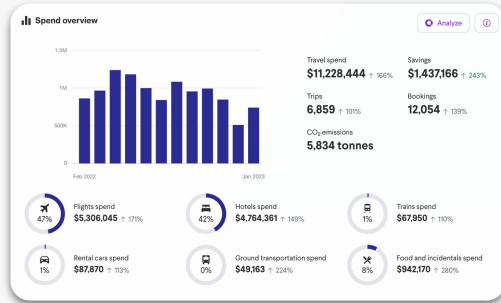
# NDC Adoption in Numbers



While legacy TMCs mention NDC as part of a hypothetical future — the reality is that NDC content for business travel is here, and it is here to stay.

Share of NDC bookings in Navan per airline across respective key markets  
February 2024

# Where to start with NDC



## Across your program

1. Identify your most booked airlines
2. Assess whether you are getting NDC
3. Quantify the gaps:
  - Missing fares
  - Price differences
  - Leakage



## With your TMC

- What is their sourcing strategy?
- In which countries are you getting NDC?
- Are their NDC optimized for self-service?

# How do we align the interests of Finance and Employees?



**Increased visibility**  
**Smarter spending**  
**Strategic savings**



**User experience**  
**Comprehensive inventory**  
**“Luxury expectations”**



# Policies force top spenders to limit spend.

## How about rewarding good behaviour?

### Top savers and spenders

#### Top spenders

Department	Department		Individual
	Average spend per booking	Bookings	Total travel spend
Sales	\$668	3,134	\$2,093,083
Customer Success	\$636	1,804	\$1,147,056
Engineering	\$812	1,304	\$1,058,569
Travel Support	\$927	1,000	\$927,183
Product	\$913	868	\$792,493
Marketing	\$776	920	\$714,137
Supplier Strategy	\$814	868	\$706,681

#### Top savers

Traveler	Department		Individual
	Savings	Bookings	Total travel spend
Wilma Fredrickson	\$31,763	62	\$100,302
Gino McAfee	\$23,472	61	\$88,232
Dino Maniscalco	\$19,550	36	\$56,697
Gail Hines	\$14,684	35	\$49,667
John Court	\$14,591	8	\$18,601
Josh Luzak	\$12,853	27	\$30,341
Aila Ashcroft	\$11,584	14	\$18,769
Marsha Owens	\$10,158	8	\$7,342

VS

# Incentivising savings

What if your employees were rewarded when they saved you money?

The screenshot displays the NAVAN Business Travel app interface. At the top, the header shows 'NAVAN Business Travel' with navigation links for Home, Trips, Events, Rewards, and Need help?. Below the header, a search bar contains the destination 'Paris, 255 Boulevard Pereire, 75017 Paris, France', the dates 'Thu, 28 Mar - Fri, 29 Mar 2024', and '1 room'. A user profile for 'Nikolai Schaub' is visible. A filter bar shows '82 of 917 results' and various filter options like 'All filters', 'Hotel or brand', 'In policy', 'Popular filters', 'Rewards & loyalty', 'Near 255 Bd Pereire', 'Ratings', and 'Reset'.

Below the search bar, a purple banner states: '€380 and up is out of policy. Your hotel policy'. A pink banner below that says: 'Book below €346 to earn Navan Rewards'. The main content area lists three hotel options:

- Le 10 Bis**: 4-star hotel, 0.1 km from 255 Bd Pereire, 8.7 Very good (201 reviews). Price: €295 (1 night total). Earn €10 in Navan Rewards.
- Fertel Maillot**: 3-star hotel, 0.1 km from 255 Bd Pereire, 8.3 Very good (303 reviews). Price: €181 (1 night total). Earn €32 in Navan Rewards.
- Le Meridien Etoile**: 4-star hotel, 0.2 km from 255 Bd Pereire, 7.5 Good (311 reviews), 2 coworkers booked this hotel. Price: €339 (1 night total). Earn €1 in Navan Rewards.

On the right side of the app, a map shows the location of the hotels in Paris, with various price markers (e.g., €285, €339, €181, €295, €236, €280, €247, €317, €282, €260) indicating the cost of different accommodations in the area.

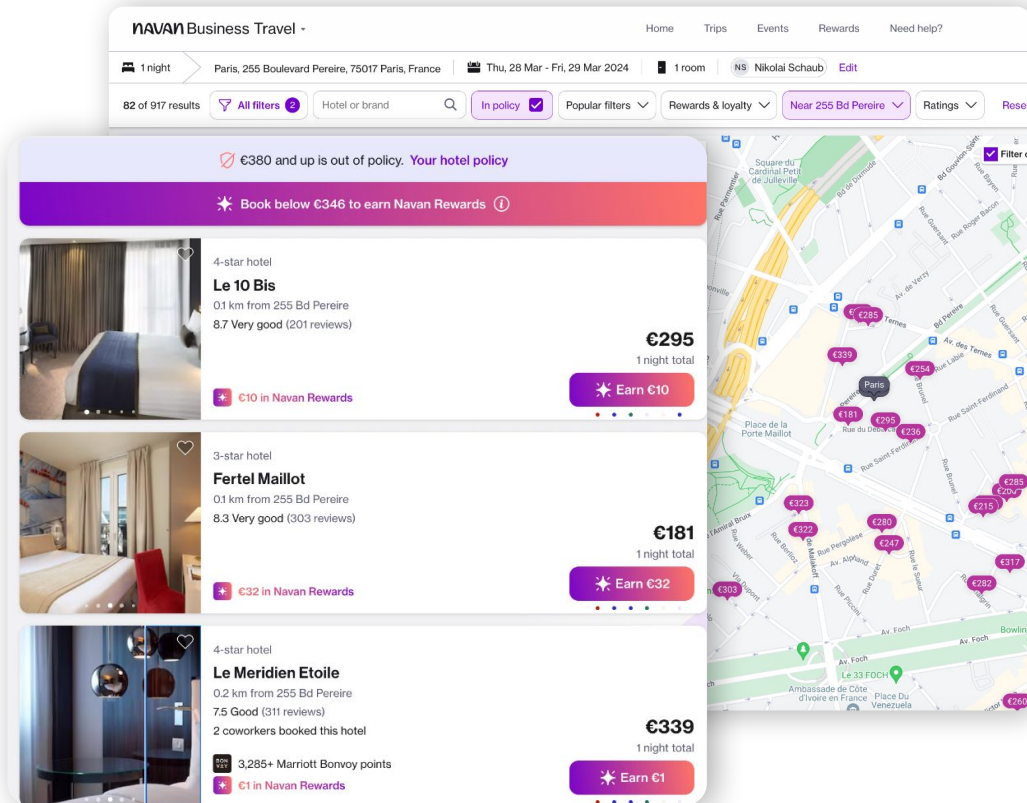
# Incentivising savings

What if your employees were rewarded when they saved you money?

**11%** reduction in average spend per night

**+15** user NPS, pre vs post Rewarded

NAVAN



# Takeaways

01

**It all starts with the users. Full adoption is key to full control and more savings.**

02

**Multi-provider strategies are essential to future-proofing travel programmes.**

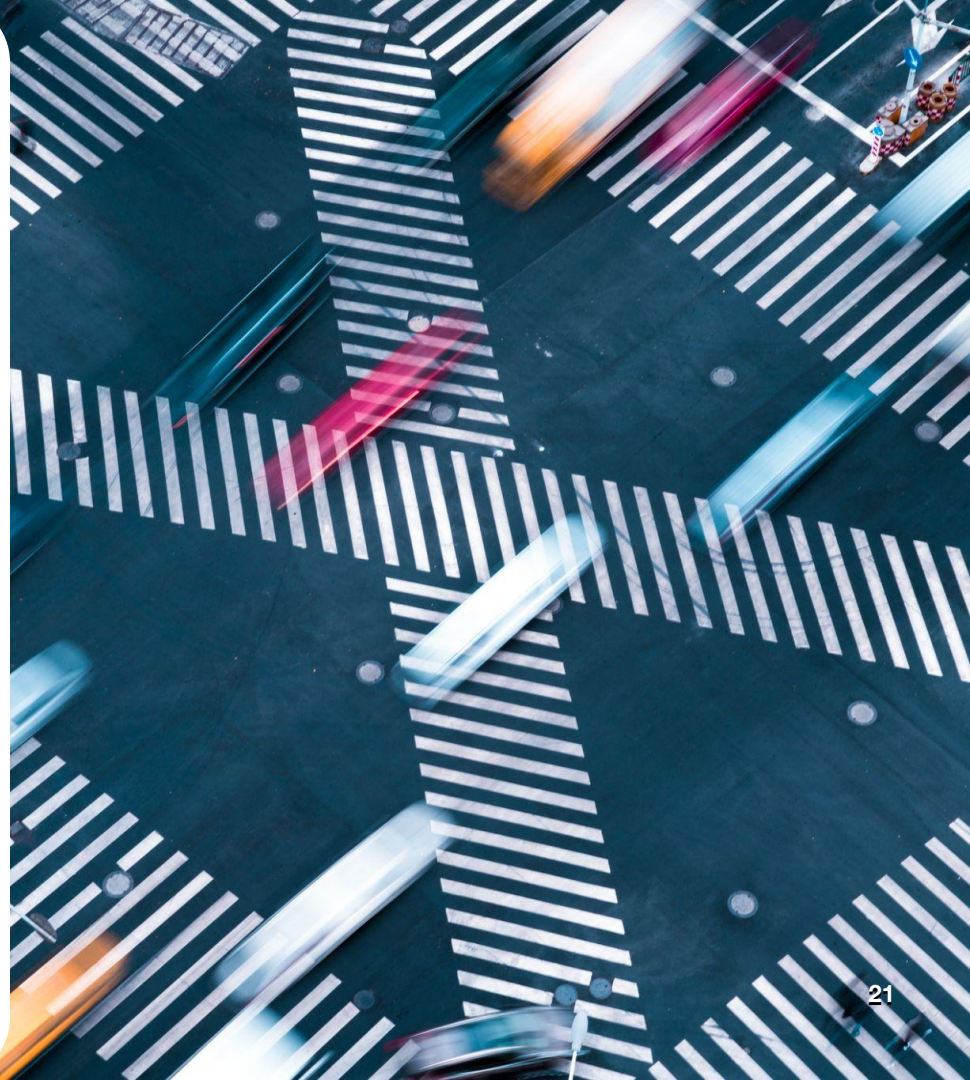
03

**Find creative ways to nudge users and reward good behaviours.**

Mission

We empower  
**in-person  
connections**  
through relentless  
innovation

NAVAN



Thank you!

**Travel and expense  
management. Solved.**



# Conversation with LGC Group



**Michael Riegel**  
CEO, EMEA  
Navan



**Danielle Sullivan**  
Global Category Manager  
LGC Group

**navan**



# Thank you!

Meet us at booth #4



