



Gaining the competitive edge in 2026 and beyond

The TMC travel intelligence playbook

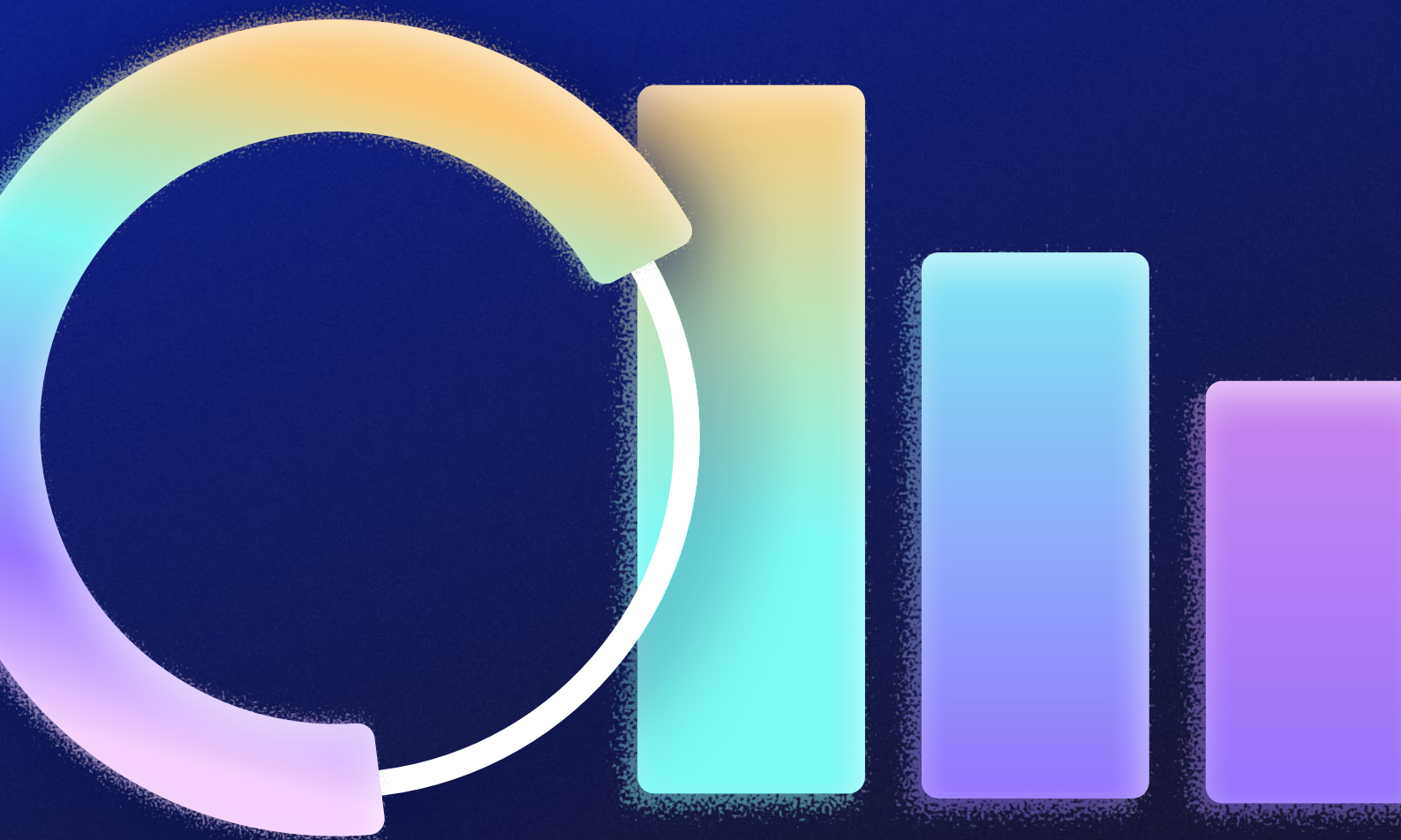
“The future of travel management belongs to TMCs
who turn data into decisions clients can feel.”

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PART ONE

The Data Paradox



Meet the data-driven dream

Nearly every traveler interaction generates data that could help TMCs serve their customers better. Booking behavior, fare changes, policy adherence, preferred routes, carriers, room types. The raw material for sharper programs, healthier margins, and a stronger traveler experience already sits inside TMC systems.

Yet for many TMCs, that promise stays out of reach. For them - every new data point adds operational friction instead of removing it. The result is a paradox most TMC operators know well: data-rich environments that still struggle to produce consistent, repeatable outcomes for clients. The gap quietly erodes efficiency, margins, and client confidence year after year.

The pages ahead lay out how TMCs can close that gap - not by adding another dashboard or replacing the tech stack, but by putting the data already on hand to work in new ways.





Data should superpower TMCs



The answers already exist in travel data. The challenge is extracting insight without increasing operational load.



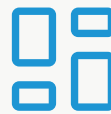
The travel industry has weathered enough cycles to know what pressure feels like. Recessions, pandemics, fare volatility, supplier consolidation. What's different now is the speed of change and the volume of decisions a single TMC has to support across its book of business at any given moment.

In theory, the wealth of travel data now available should make those decisions easier. In practice, it often doesn't. Access alone isn't the answer. The challenge is connecting what already exists, interpreting it fast enough to matter, and turning it into action at portfolio scale.

Reality check: Where data falls short for TMCs



Data is abundant, but scattered



Collected but not connected



Reported but not understood



Understood but not acted upon

In short: travel is rich in data, poor in visibility

The sky high cost of flying blind

Data isn't a nice-to-have. It's the difference between a TMC that grows accounts and one that defends them. When data sits unused, programs drift, service feels generic, and the cost of running a travel program quietly creeps up for the buyer, and for the TMC supporting them.

Most TMCs already hold a wealth of traveler data. What's missing is the connective tissue: a way to analyze it continuously, at portfolio scale, without pulling account managers into custom analysis every time a client asks a hard question. Without that layer, visibility stays shallow, and the more advanced capabilities the industry is talking about: agentic AI, continuous program optimization, real-time advisory, stay locked behind manual work.

Industry research backs this up. BCD Travel's 2025 Travel Buyer Survey found only one in three buyers feel confident in their data, and nearly half struggle to use it proactively. The signal for TMCs is clear: data today mostly explains the past. It rarely supports confident, forward-looking guidance at the scale a TMC operates.

Spend and compliance reports are important, but the real opportunity is what comes next. Connecting reshopping, sourcing, and traveler behavior signals into a continuous loop that turns raw information into foresight. Patterns surface. Inefficiencies show up before they show up on a client's invoice. Decisions get made earlier, with more context, and without adding headcount.

We're surrounded by more data than ever before, but still can't turn it into action. That's the data paradox.

Clearer signals lead to stronger client conversations

Top-performing TMCs have started thinking differently about their data, and the results speak for themselves.

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The pressure shows in buyer data

(BCD Travel survey (April 2025))

57%

Say their data is scattered across too many systems



50%

Struggle to turn their data into proactive insight



43%

Feel confident acting on data



56%

Rate themselves as good at collecting data



TMC takeaway: Buyers are good at collecting data but may struggle utilizing it. The task of explaining outcomes, defending sourcing decisions, or pointing to what to do next falls on whoever manages sourcing for the buyer. That's both a burden and an opening: the TMCs that show up with answers will be the ones buyers stay with.

Three blind (data) spots. Three openings.

Every agency has data blind spots. In some cases, reshopping data isn't analyzed to reveal the patterns behind them. In others, sourcing data lacks real-time visibility into utilization of negotiated rates. And too often, insight doesn't translate into scalable operational execution or better traveler experience. Each blind spot is an opening, a place where better use of existing data can turn reactive service into a competitive advantage.

The reshopping blind spot

What's happening

Reshopping generates enormous volumes of traveler behavior data: policy adherence, preferred routes, room types, carrier choice, fare timing. Most of it is never analyzed beyond the per-booking savings figure.

Impact

Reshopping stays transactional. One of the richest behavioral datasets a TMC owns goes unused for program tuning, sourcing input, or service prioritization.

How to fix this

Use reshopping data as a portfolio-wide behavioral signal. Customize savings performance, surface policy and leakage issues early, and absorb market shocks before they reach the buyer.

The sourcing blind spot

What's happening

Sourcing decisions are made against historical data and static benchmarks. There's limited visibility into whether negotiated rates are actually used, accessible, or competitive at the moment of booking.

Impact

Contracts look strong on paper and underperform in practice. Utilization gaps aren't caught and fixed in real time. This opens an opportunity for TMCs looking advise customers in this space.

How to fix this

Audit negotiated rates continuously against live booking behavior. Show buyers which negotiated rates are working, which aren't, and where to renegotiate, without waiting for the next RFP cycle.

The AI blindspot

What's happening

Optimization opportunities are visible in the data, but acting on them depends on account managers, custom analysis, and one-off client work. AI gets discussed and piloted, but rarely runs in production.

Impact

Insight doesn't scale. Service quality stays uneven across the long tail of clients, and operational cost climbs with every account added.

How to fix this

Feed traveler behavior signals into agentic AI so it prompts the right action at the right moment. Close leakage, lift hotel attachment, improve policy adherence, and remove load from human agents.

You have the data. But do you know what to do with it?

It's time to turn insight into value.

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PART TWO

The Playbook



Play #1:

Reshopping

Support consistent rate performance at booking, at scale

Reshopping fires on every PNR, or close to it, across an entire client portfolio. That makes it a continuous, high-volume source of traveler behavior data. Reshopping adds a unique intelligence layer to travel spend data a TMC already has access to: real-time policy adherence, live fare availability insights, and booking behavior that can affect savings. This data demonstrates where small adjustments can drastically improve program performance - creating value that compounds rapidly across an entire portfolio.

Treated as a transactional service, reshopping caps out at the rebook. Treated as an intelligence layer, the same data can boost savings performance, direct policy adjustments and supplier agreements, flag policy drift before it surfaces in a QBR. This gives the TMC a behavioral view of how its book of business actually travels.

For TMCs, that turns reshopping from a feature line into a service moat and a strategic lever: hard to replicate, hard to switch away from, and quietly strengthening the case for renewal at every QBR.



When done right, reshopping data tells you:



Which clients are leaving savings on the table, and why



Where policy is drifting, by client and by traveler segment



Which markets are volatile enough to warrant pricing model changes



Which adjustments can provide price optimization opportunities

The smart reshopping playbook

Action	What it unlocks	Why it matters	How to do it	How easy it is
Customize savings performance per client (or per portfolio)	Reshopping configuration that reflects how travelers actually book, and optimizes savings or revenue opportunities.	Most TMCs run a single reshopping config across their portfolio. Behavioral data shows where tuning lifts savings without rebuilding the program.	- Analyze fare timing, lead times, and rate-type usage by client. - Adjust reshopping rules where the data supports it. - Validate against savings outcomes.	 Easy (with the right platform, hard without)
Spot policy drift early	Shows where travelers choose alternatives because preferred rates aren't usable or compelling.	Policy issues usually surface in a QBR after the damage is done. Reshopping data flags the drift while it's still fixable.	- Analyze reshopping outcomes by supplier, route, and market. - Identify recurring patterns where preferred options lose out	 Moderate
Prioritize service attention across the long tail	A way to focus account management on the clients and segments where intervention will move the number.	TMC service capacity is finite. Reshopping behavior shows which accounts have leakage worth chasing and which are running clean.	- Aggregate reshopping outcomes across the portfolio. - Rank accounts by missed-savings exposure and policy adherence. - Route account team time accordingly.	 Moderate
Translate reshopping data into client-ready intelligence	QBR material that goes beyond savings totals to behavioral insight.	Buyers increasingly want their TMC to explain why a program is performing the way it is. Reshopping data is where that answer lives.	- Package reshopping outcomes into client-facing reports that show patterns, not just totals. - Connect findings to the next set of program decisions.	 Moderate
Stay ahead of dynamic pricing	Continuous protection against price volatility, with timing informed by machine learning.	Static reshopping cycles miss price movements that happen between scans. Predictive models close that gap.	Use automated reshopping that identifies when prices are likely to move on a given booking and rebooks automatically when better options appear.	 Easy (with automated reshopping, manual without)



"Reshopping data is the most underused asset on a TMC's balance sheet. The TMCs that use it well will be the ones their clients can't replace."



Play #2: Sourcing

Turn sourcing from an annual exercise into a continuous service

Sourcing is where the gap between negotiated and realized value tends to be widest. Contracts get filed, rates get loaded, and most of what happens next is invisible until the next QBR.

Sourcing analytics changes that. The same booking and reshopping data already flowing through the TMC can answer the questions that matter: are negotiated rates applied correctly at booking, are the contracts on file covering where clients actually fly, and where is realized value falling behind what the contract promised.

That visibility does two jobs. It turns the TMC into a continuous advisor for corporate clients, the role buyers are now asking for. And aggregated across the book of business, it sharpens the TMC's own supplier negotiations.

What sourcing data answers when it's analyzed properly:



Where negotiated rates are not available at the Point of Sale, by supplier, route, or channel



Which routes and markets are missing from the program entirely



Which contracts underperform against actual booking patterns



How utilization compares across clients, segments, and suppliers



Where coverage gaps push travelers into non-preferred bookings



Where aggregated TMC volume can unlock better terms and simplify a buyer's sourcing program



“Most sourcing programs are judged once a year. The ones that win are continuously reviewed throughout the year.”



The smart sourcing playbook

Action	What it unlocks	Why it matters	How to do it	How easy it is
Catch rate-loading failures in real time	Visibility into when negotiated rates fail to display correctly at the moment of booking.	Loading errors, expired filings, and content gaps quietly turn negotiated rates into missed savings. Most TMCs don't see these failures until a buyer asks why utilization is low.	- Monitor bookings against the corporate's contracts with suppliers. - Flag mismatches by supplier, route, and channel. - Route fixes to the right team before the issue compounds.	 Moderate (with the right platform, hard without)
Audit contracts against real booking behavior	A continuous read on which contracts are actually working and which aren't.	Contracts get reviewed every two years at best. Bookings happen every day, market conditions are constantly changing. The gap between the two is where unrealized value sits.	- Compare booking patterns against contracted routes, markets, and suppliers. - Flag underperforming contracts and unused negotiated rates. - Bring findings into client conversations and the next negotiation cycle.	 Easy
Identify program coverage gaps	A clear view of where travelers are forced to book outside the program.	Coverage gaps drive leakage, traveler friction, and non-preferred spend. Most surface only when buyers complain.	- Map booking data by city, route, fare class, room type and supplier. - Identify high-volume markets where travelers default to non-preferred options. - Recommend new suppliers, expanded content, or local dynamic pricing.	 Moderate
Match pricing models to market behavior	The right pricing model in each market, not the same one everywhere	Fixed rates underperform in volatile markets. Aligning model choice with real booking behavior keeps programs competitive without renegotiating everything.	- Use booking and reshopping data to assess volatility and seasonality by market. - Apply fixed pricing where stable, dynamic where not. - Revisit as conditions shift.	 Easy

**Most travel programs wait for the next RFP cycle to change.
Leading TMCs help their clients optimize continuously.**

With Oversee's analytics platform, available to reshopping customers, TMCs gain visibility into real-world pricing performance across their client portfolio without waiting for the next RFP or renegotiation cycle.

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Intelligent sourcing:

Data in action

At the GBTA 2025 Air Sourcing Panel in Denver, a live poll surfaced what travel buyers actually feel about their own data. The picture is uneven, and the openings for TMCs are clear.

What we heard

Confidence in challenging airline data



counter airline arguments with their own data



rely on airline-provided data, effectively negotiating with the supplier's numbers



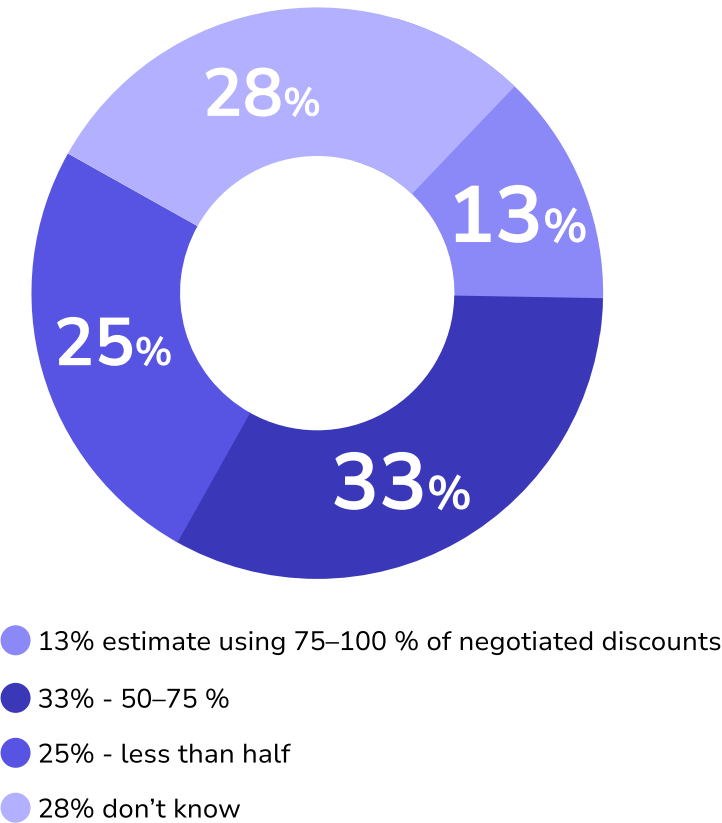
mostly accept airline claims or have no data

The TMC opening

Nearly half of buyers walk into negotiations at a data disadvantage. TMCs that bring booking-based intelligence rebalance the table and graduate from supplier to strategic partner.



Utilization of negotiated discounts



What sourcing feels like

34%
are frustrated by complexity

31%
feel resigned to the status quo

21%
are overwhelmed by data challenges

15%
only - feel confident and in control

The TMC opening

Most buyers can't quantify what they're getting from their own contracts. TMCs that can show realized vs. negotiated utilization fill a gap the buyer can't fill alone.

The TMC opening

Sourcing isn't just operationally hard for buyers. It's draining. The TMC that translates complexity into clear next steps becomes the one buyers don't want to replace.

“If the buyer can't see their own contract utilization, the TMC that reveals it to them owns the relationship.”



Play #3: Agentic AI

VIP Service for all through the traveler profile

Most agentic AI conversations in travel focus on replacing agents or automating bookings. The bigger opportunity for TMCs is service personalization, and the raw material is already in the traveler profile.

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“AI connects the dots between data and action, turning insights into actionable intelligence.”

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When the profile carries behavioral signals: preferred hotel chains, frequent routes, airline loyalty, booking habits, agentic AI can tailor every interaction to the individual traveler. That's where upselling, cross-selling, and reduced program leakage actually happen. Suggest the hotel chain the traveler always picks. Offer the route they prefer. Surface the upgrade they'd accept. Each of those small, profile-aware moments is one a human agent doesn't have the bandwidth to deliver across an entire portfolio.

For TMCs, that turns agentic AI from a cost-saving tool into a service multiplier. Better attachment, less leakage, a smoother traveler experience, and renewal conversations that get easier every quarter.

Tailors offers to traveler preferences and booking history

Lifts hotel attachment rates

Surfaces upsell and cross-sell moments aligned to the individual

Reduces leakage by guiding travelers to options they want

Delivers personalized service across the tail human agents can't cover

The Agentic AI playbook

Action	What it unlocks		Why it matters	How to do it	How easy it is
Lift hotel attachment on flight-only bookings	More hotel bookings inside the TMC channel.	Flight-only bookings leak hotel revenue to direct booking and OTAs. Profile-driven prompts catch the booking moment before it slips.		• Trigger hotel suggestions when a flight is booked alone. • Lead with chains and locations the traveler has used before.	★★★★★ Easy
Reduce program leakage through preference matching	Higher in-program booking rates without heavier enforcement.	Travelers leak when the program doesn't show them what they want. Profile matching closes the gap by leading with options they'd already pick.		• Surface in-program options that match traveler preferences. • Make the compliant choice the obvious choice.	★★★★★ Moderate
Personalize offers at the booking moment	Suggestions tailored to the individual traveler instead of generic options.	Generic offers get ignored. Profile-aware offers get accepted, which is where attachment and upsell revenue actually comes from.		• Use profile data to surface the hotel chains, routes, and fare types the traveler is most likely to book. Offer them first.	★★★★★ Moderate
Free human agents for the work that needs them	Agent capacity redirected to complex cases and revenue-generating activity.	Profile-aware AI handles the routine and the personalized at the same time. That's how coverage scales across the long tail.		• Route profile-driven personalization to AI. • Reserve human agents for exceptions, VIPs, and revenue moments.	★★★★★ Moderate

The futuristic utopia					
Build a behavioral traveler profile	A profile that reflects how the traveler actually books, not just who they are.	Most traveler profiles carry static data: name, loyalty numbers, seat preference. Behavioral signals are what make AI useful.		• Layer booking history, supplier preferences, route patterns, and hotel choices into the profile. • Keep it updating as the traveler books.	★★★★★ Advanced

Leading TMCs are already using **Oversee** to turn data into clearer, more consistent pricing outcomes across client portfolios.

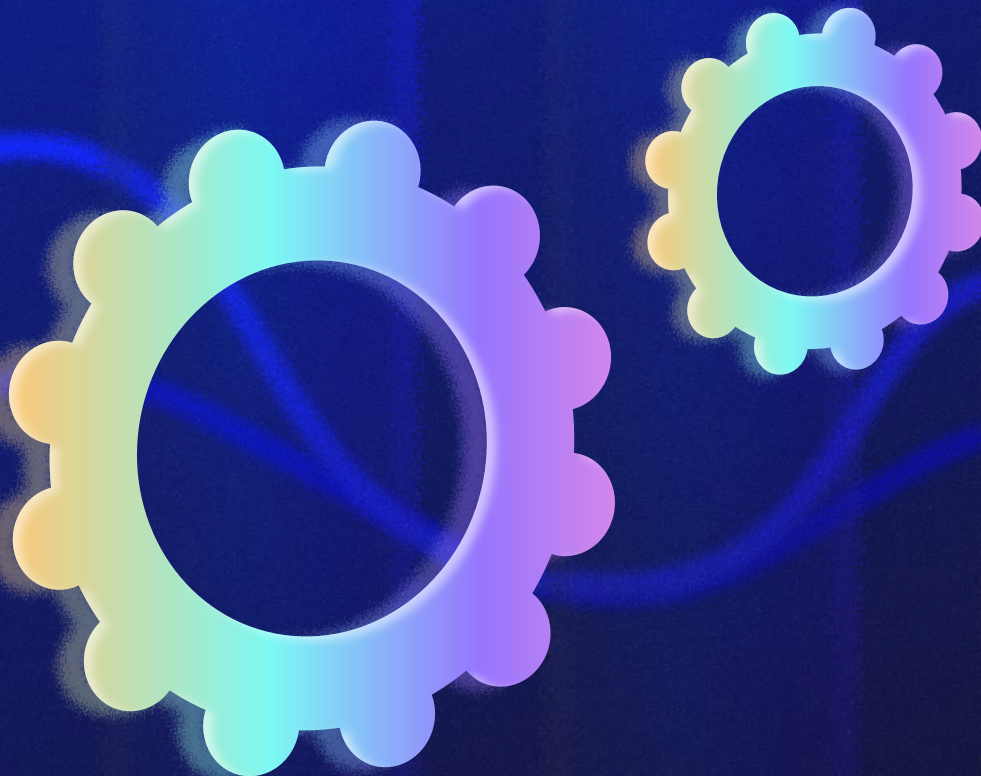
Book your discovery call and start doing more with your data today.

BOOK CALL ↗

PART THREE

Your data optimization plan

Turning insight into continuous improvement



Are you using your data, or just collecting it?

Five questions to ask before the next QBR:

- ☐ Is reshopping configured to run consistently and automatically across most clients, without ongoing tuning?
- ☐ Can you explain where sourcing breaks down in real booking conditions without manual analysis?
- ☐ Do account managers walk into client meetings with behavioral insight, not just savings totals?
- ☐ Do you know where your portfolio is leaking revenue today? Flight-only bookings missing hotels, travelers leaking to OTAs, missed upsell moments - and is anything actually closing it?

If you can't confidently answer "yes" to most of these, you're not alone. But it's time to act because you're leaving measurable value on the table.

Where to start

The TMCs that get the most out of their data don't start by replacing systems. They start by putting what's already running to work.

1

Turn reshopping into intelligence.

Reshopping data is already flowing. The fastest win is reading it as behavioral data, not just savings data. That gives account managers something new to bring into client conversations and surfaces the patterns that inform every other play.

2

Layer in sourcing analytics.

Once reshopping data is being read at the portfolio level, sourcing analytics is the natural next step. The same booking data that powers reshopping answers the harder sourcing questions: where rates are failing to load, where contracts are underperforming, where coverage gaps are pushing travelers out of program.

3

Turn agentic AI into a service multiplier.

With reshopping behavior and sourcing data flowing, agentic AI becomes the layer that puts both to work for the traveler. Lift hotel attachment on flight-only bookings. Reduce program leakage by guiding travelers to options they'd already pick. Free human agents for the work that needs them. The revenue and retention impact shows up on both sides — TMC and client.

Each step compounds. Reshopping intelligence sharpens sourcing. Sourcing tightens the program. Agentic AI delivers the result back to the traveler. Done in this order, none of it requires ripping anything out.

Final thoughts: From data thinking to data doing

Most TMCs are not short on data. They're short on time, headcount, and a clear way to turn what they already have into outcomes a client can feel. That gap is where retention is won or lost.

The TMCs that win treat data as the engine behind their service model. Reshopping drives savings and revenue while feeding the behavioral data sourcing needs. Sourcing shows where rates underperform and agreements miss traveler reality. Agentic AI lifts attachment, reduces leakage, and frees agents. Together, they defend margin, grow wallet share, and give buyers data to show leadership.

The next decade of travel management belongs to the TMCs that compound these gains over time. Their data is the retention lever the competition doesn't have.

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The future of travel management won't be defined by who has the most data, but by who uses it best.

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Ready to see what connected data can do for your travel program?

Reach out and let's uncover the savings, insights,
& opportunities hiding in your data.

LET'S DO IT ↗

Corporate travel, reimagined

We are Overseer

Powered by decades of industry experience and AI, we're on a mission to reimagine corporate travel. And that starts with optimizing how leading companies approach resourcing, sourcing, auditing and operational workflows.

We offer what we call an all-in-one-growth engine. Our product suite is designed to maximize savings and boost revenue while also increasing operational efficiency. That means no more inefficiencies, lost revenue or wasted time. Say hello to a new way to manage travel.

More than technology, we're about giving travel companies the confidence to move forward in a rapidly changing world. We don't just help companies keep up with change. We help them turn it into their competitive advantage. That's why the world's leading companies trust us to AI power their travel operations.

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The future of corporate travel isn't about keeping pace. It's about leading change. Overseer helps you get there.

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- **Air & hotel price assurance:** securing the best rates and increasing revenue on every booking
- **Travel program optimization:** providing insights to refine policy, sourcing, and program performance
- **Agentic AI for travel:** freeing agents to focus on sales while automation manages routine tasks

Ready to rethink your travel program?

Let's talk about how Overseer can help you turn your travel data into measurable growth.

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