

SME 2014

Analyzing business travel management and procurement practices
among small and medium enterprises



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Dear Fellow Travel Professionals,

Small to mid-sized enterprises are vitally important drivers of the economy. Whether your business is emerging or well established, we understand that you have unique business travel needs—especially relative to convenience, service and overall value.

We're honored to partner with *Business Travel News* to bring you this special report focusing on the SME segment. Research such as this helps you get the most value for your travel investment and helps you manage travel as effectively as possible. As a travel supplier, we also use this type of research to build our business around the needs of yours.

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We hope you find this study helpful as you refine your travel program to support your travelers and your business objectives.

As always, we look forward to partnering with you to keep climbing in 2014 and beyond.

Warm regards,

Steve Sear

Senior Vice President – Global Sales
Delta Air Lines



Dear BTN Readers,

Unquestionably, small to mid-size enterprises are critical to driving economic growth across the globe. SMEs create good jobs and frequently serve as “incubators” for the creation of larger firms of the future, particularly in the technology industry.

Today SMEs, like larger companies, are prioritizing technology investments to help transform their businesses. At Egencia, we're committed to delivering smart travel solutions that make business travel, and the management of it, better for all involved. Our culture is entrepreneurial much like small to medium businesses. We develop and test ideas—adopting the ones that work, moving on quickly from the ones that do not.

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This year it's exciting for Egencia to be a part of *Business Travel News'* Small and Midmarket Benchmarks Study. We look forward to sharing the learnings with you and the 2,000 SMEs that partner with us in North America.

Best Regards,

Mark Hollyhead
Egencia's Senior Vice President of the Americas

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Enjoy this research issue as a tool that will help you guide your company to implement or optimize a travel program that fits your unique corporate culture and growing travel demands. As your hotel program needs evolve, we hope you will consider our extended stay brands as part of your travel management strategy.

We invite you and your travelers to stay with us soon at any of our over 500 Staybridge Suites and Candlewood Suites hotels.

Best wishes,

Robert Radomski, Vice President
Global Brand Management - Extended Stay

Analyzing Travel Management And Procurement Practices In The Small And Medium Enterprise Market



CHRIS DAVIS
EDITOR-IN-CHIEF
THE BTN GROUP

THEY MAY HAVE similar levels of air travel spending, but finding other common travel management threads among organizations that comprise the small and midsize enterprise segment can be a more taxing assignment than it would seem.

Defined by *Business Travel News* as those organizations that in the most recent full year spent \$2 million or less on U.S.-booked airline tickets and those that spent between \$2 million and \$12 million, respectively, small and midmarket enterprises span the breadth of today's travel management philosophies—from fully unmanaged to entirely mandated and all points in between. Some of their travel patterns cross the globe, others don't fly much at all. Some have deployed a full suite of technological travel and expense management solutions, others use paper, pens and cash advances as their data and expense platforms.

With those differences in mind, this resource issue explores the trends in supplier offerings for and best practices of the SME segment. The following pages examine the methods by which these organizations today structure their travel programs, their philosophies regarding policy creation and implementation, their use of travel management companies and online booking tools, their stances on card-based payment programs and automated expense reporting, their efforts to manage meetings, and their dealings with travel suppliers.

Attempting to establish travel management benchmarks for groups of organizations with such disparate travel practices and policies is a dicey proposition; a single, supposedly representative spending or price metric surely will not apply to many SME organizations. The following page, however, offers some midpoints and ranges for some key travel management metrics from *BTN's* pool of respondents to establish not an ironclad benchmark but at least a representative sample of the experiences of surveyed SME respondents.

METHODOLOGY

The *Business Travel News* 2014 Small & Medium Enterprise Report includes a research component designed to elicit actual travel spending and data from qualified travel buyers. *BTN* from January to March 2014 conducted the online survey through SurveyMonkey. A direct link to the online survey was emailed to appropriate members of The *BTN* Group Advisory Board and Research Council, as well as qualified subscribers of *BTN* Group publications, including *BTN* and *Travel Procurement* magazine.

Responses to the survey were tabulated only if respondents indicated their organizations had 2013 U.S.-booked air volumes of between \$500,000 and \$12 million. In all, 101 respondents representing small and midsize enterprises answered at least some of the survey questions; of those respondents, 52 qualified as representing midsize organizations while 49 represented small enterprises. Not all respondents answered every question.

BTN tabulated responses from SurveyMonkey and selected specific topics to represent as benchmark charts on page 7. The data points labeled "median" represent the precise median of all responses from all small and medium enterprise respondents. Those labeled "20 percent range" represent the middle 20 percent of all responses received for that question; that is, 40 percent of responses indicated a figure higher than the highest endpoint of the listed range, while another 40 percent reported a figure lower than the lowest range endpoint. Twenty percent of the respondents reported figures within the range.

BTN thanks all of those who participated in the making of this issue, including all survey respondents and those who participated in interviews for the following reports. ↻

SME BENCHMARKS 2014



Ranges represent median 20 percent of all small and midmarket respondents. See page 6 for full methodology.

Average 2013 U.S. Domestic Economy-Class Airfare Paid
Including mandatory taxes and fees; excluding ancillary charges

Range:
\$420 – \$479

Average 2013 U.S. Domestic Economy-Class Airfare Cost Per Mile

Range:
22 cents – 26 cents

2013 U.S.-Booked Air Tickets That Received A Front-End Negotiated Discount

Median:
35%



RANGE:
13% – 15%

Average 2014 U.S. Negotiated Hotel Rate Discount

Average 2013 U.S. Midsize Daily Car Rental Rate
Including all mandatory surcharges and taxes

RANGE:
\$40 – \$42

Range:
15% - 17%

Total 2013 Travel Spending Saved Via Management Of Travel Expenses

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* American, Delta, US Airways, United/Continental: 2013, U.S. Department of Transportation Air Travel Consumer Report

From Unmanaged To Maturity, Small And Midsize Companies Take Myriad Travel Management Paths



BY JAY BOEHMER

ASKED TO HIGHLIGHT a primary goal for 2014, many respondents to *BTN's* Small & Medium Enterprise Report survey cited their desire to contain travel costs. It's no surprise. Cost containment is a perennial challenge and annual objective for travel programs of all stripes—from big spenders like IBM to small businesses with only a few travelers.

The methods companies use to achieve those goals, though, vary as widely as the organizations that comprise the vast small and midsize segments, the former defined by *BTN* as those with less than \$2 million in annual U.S.-booked air travel

and the latter ranging from \$2 million to \$12 million.

Approaches to travel among companies in these segments can range from little or no management to mature, multinational programs. Some may control their travel spend with the sophisticated procurement strategies and internal resources that match organizations with multiples of their spend. Others might not have a travel management company, let alone a travel policy. Some are just getting started.

Of course, many factors beyond program size drive a company's approach to travel management. Industry segment,

travel patterns, company culture and senior management support level, among others, play significant roles.

Yet, at the risk of generalizing, some features emerge as travel management practices slide down the spending scale: Internal resources can be strapped, a dedicated manager may not be allocated, supplier relationships could be lacking and many aspects of program management may be deferred to a travel agency, if one is used at all.

Even so, travel management goals and objectives have "to do more with the maturity of the company as it relates to travel program than it does the size," said

Orbitz for Business vice president of strategy and account management Mark Walton. “I think this business is an equal-opportunity business, meaning what’s available to the largest companies is available to the smallest, and therefore they should be looking at it as such.”

Regardless of how small a company is, it’s never too soon to take the first steps. “I don’t believe there’s a company out there that can’t benefit from some level of a managed program,” said Directravel president Sam DeFranco. “When a company feels like there’s a lack of control of their spending and they only have basic expense processes in place, their antenna should be up.”

THE FUNDAMENTALS

Carlson Wagonlit Travel’s consulting unit, CWT Solutions Group, last year established new consulting services that cater directly to the small and midsize segments. Its entry into that market posed as much of a learning challenge for CWT as it did to clients. In contrast to more mature programs, CWT’s work in this segment has focused on program fundamentals, said CWT Solutions Group senior director of North America Joel Wartgow. “As consultants, we’re very good at diving into the weeds and providing very comprehensive analysis,” he said. “It was a little bit of a learning curve for us, where maybe we were overkilling this for some of these customers.”

Instead, the initial focus within this segment has skewed toward what Wartgow called “a health assessment” of the travel program. “Taking their program as it exists today: Where do we think it’s healthy? Where do we think it needs some attention, and where can we provide them with some guidance on next steps?” he said.

Getting the fundamentals in place was a clear target among a few respondents representing small companies. One highlighted a goal to secure in 2014 “ex-

ecutive management buy-in for utilization of a travel management company,” noting the company, which has less than \$2 million in annual air spend, “has a family-like culture, and few are familiar with the benefits a TMC and a booking tool can bring to the organization.”

A similarly situated small-business respondent indicated plans to show in 2014 “the value of the travel area so stakeholders and leadership understand that there is a difference in being a traveler and the management of a corporate travel program.”

One small-company respondent highlighted a goal to secure in 2014 “executive management buy-in for utilization of a travel management company,” noting the company “has a family-like culture, and few are familiar with the benefits a TMC and a booking tool can bring to the organization.”

Another cited the importance of documenting return on investment in addressing the challenge of “gaining leadership support for bringing in a TMC. Without greater visibility into our spending habits it is very difficult to present a solid business case whose ROI rivals other projects for resource allocation.”

Few things can more quickly gain senior management attention and build support than a growing expense line, and quite a few companies in this segment have just that when it comes to travel. “At many companies,” said Walton, “it’s still the second- or third-largest controllable expense line item that they have, and therefore it’s considerably important.”

Wartgow noted that in the small and midsize category, “A lot of these companies are growing so fast. They start to look at their T&E line on the company portfolios, and it’s increasing rapidly. We don’t even know where these people are going or how they’re getting there, so let’s put some structure around it.”

LAYING THE BEDROCK

Citing challenges for some small businesses, Walton said that “senior leadership support” is the first step to building a travel program. After that, to lay the bedrock he suggested the formation of a travel policy, engagement with a travel management company and the implementation of a booking tool. “If you have those four, you are putting yourself in a position to not only achieve immediate savings but to control your business,” he said.

As for policy, Walton said it’s “more of a cultural issue, so you could have a very

small company with a very strict policy and the opposite on the large side.” Yet, he noted that as companies grow their global footprints, policy can become more complex in addressing specific local needs. “A larger company will have more supplier agreements, so they may be asking their travelers to be more compliant, specifically to an airline or hotel, because of the types of relationships and requirements they have to meet certain marketshare thresholds.”

Unlike direct supplier relationships, policy controls to limit spending are at the disposal of any size company. For airlines, advance-purchase requirements, cabin-class restrictions and lowest-logical-airfare requirements can be effective. For hotel, tier restrictions or spending guidelines can drive down costs.

Some types of policies might even work better at smaller, less complex companies. “We receive more requests for client messaging and pre-trip authorization in

CONTINUED ON PAGE 14

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Travel management strategies are essential for companies big and small, but IHG® understands that one size does not fit all. Small and mid-size travel programs are unique, and IHG has multiple hotel solutions to support them.

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Candlewood Suites hotels (top) offer business travelers an environment to live, work and relax on their own schedule; Staybridge Suites hotels (bottom) offer a comfortable home base, where travelers can connect with their clients and other guests.

IHG® offers the right extended stay travel choices for travelers and companies

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the SME space,” said DeFranco. “Larger companies express an interest, but many do not move forward with integration due to the complexities on a larger scale.”

Jerry Richerson, strategic sourcing director for real estate services company Stewart Title Guaranty Co., said the company has yet to deploy a full-on travel policy and does not mandate supplier usage. Not to say the category is completely unmanaged. “We have elements of a policy, but it is mapped and wrapped around our expense management policy,” he said. “Specifically, it addresses things like you can’t stay in five-star hotels or fly first class.”

Richerson has explored further management, eyeing relationships with travel management companies, but such initiatives have yet to advance, though they just might as spend grows. “As the real estate industry recovers, more will be spent on meals, conferences and events,” he said. “When the volume increases, the business case for those things will become bigger, and people will start paying attention.”

GETTING TOOLS IN PLACE

Several small-company respondents indicated that key initiatives this year involved getting the right tools and processes in place. One was in the midst of



lishing a booking tool and engaging with a TMC as being “somewhat more tactical in nature,” but as programs mature they take on a more strategic focus, with initiatives targeting procurement, multinational management, data consolidation and supplier relationships.

While not always the case, responses from midmarket companies to the *BTN* survey suggested a little more maturity than their smaller counterparts, as several discussed direct supplier negotiations, data capture and integrity, savings mea-

and initiatives to take them higher.

“Once you have a strategic view of your travel program, your goals do change,” said Walton. “You’re looking at your business differently as it matures. And as you’re looking for opportunities of continuous improvement, you are putting different practices in place that will allow you to achieve that level of improvement.”

THE MORE YOU MANAGE, THE MORE YOU MANAGE

The idea of “continuous improvement” may sound familiar to midmarket telecommunications services firm Goodman Networks. Since 2011, the company has transformed a lightly managed travel program into an increasingly mature one. Within six months of joining the organization that year, director of corporate travel Karen Hatch led the bid, selection and implementation of a new travel management company; oversaw the rollout of an automated expense reporting system (and the linking of that system to a new booking tool); revised Goodman’s travel policies; and streamlined its T&E payment processes. Those core components of the

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While a few respondents in the small segment were just beginning to embark on online booking tool selection and implementation, more midmarket companies were touting growing rates of adoption and initiatives to take them higher.

“designing and implementing a full-scale travel management program,” while others indicated plans to launch an online booking tool, initiate a TMC relationship or deploy an automated expense-reporting system.

Walton described such actions as estab-

ishment initiatives, multinational travel programs and agency consolidation. While a few respondents in the small segment were just beginning to embark on online booking tool selection and implementation, more midmarket companies were touting growing rates of adoption

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company's travel program contributed to savings and senior management support, but, as travel managers know well, the work is never done.

With a core program in place, the company, with its growing travel spend, is working to transition recent acquisitions to the managed travel fold and is refining data reporting and budgeting procedures to better steer travel dollars.

Hatch said the travel category has risen to "the executive level of exposure, and having that executive support is critical." To more wisely spend travel dollars, Hatch this year is examining budgeted versus actual spending on travel.

"Because we're able to look at budgeted cost of travel for each of the different organizations, I'm now tracking actuals that way," she said. "I get the reports from finance, then we look at what they planned and what actual costs are each month."

There is a strategic component to managing spending this way: "Rather than killing ourselves at the end of the year and cutting off travel—we still have to service our customers—my goal is to help people travel smarter year-round, to book in advance and all of those good things you can do to cut costs from the beginning of the year, not just waiting until October, when everybody has blown their budgets."

Other signs of maturity in Goodman's program include direct deals with suppliers, meetings management integration and travel management company consolidation.

EVEN WITH STRUCTURE, CHALLENGES PERSIST

Even with such travel management fundamentals a travel policy, a TMC relationship and booking tool, multiple midmarket company respondents reported ongoing challenges with compliance. Among a few dozen open-ended responses, 10 specified

as their "greatest travel management challenge today" some aspect of getting travelers to comply.

One respondent noted the largest challenge was getting travelers to "book all travel, including hotels, through our travel management firm." A few were challenged by travelers who, as one wrote, "continue to feel that they can locate better fares" outside of the program, and another sought to ramp up compliance "without mandates."

Other challenges cited by respondents in the midmarket segment ranged from multinational travel management and duty of care to hotel leakage.

A few small-company respondents similarly noted compliance as their

challenge as "achieving objectives with limited resources." It's a position in which many managers in the small and midsize segments find themselves.

According to *BTN's* 2013 Salary and Attitudes Survey, travel managers at larger companies dedicated more time to travel management and had larger teams than those from smaller companies, who often juggle roles outside of travel.

"In those scenarios, the travel management company plays a larger role in the program's success," said Walton. "We hear time and again from our clients how important our account management organization is, because of that very point. Resources are spread relatively thin so the people who are managing for small to

Multiple midmarket company respondents reported ongoing challenges with compliance. Among a few dozen open-ended responses, 10 specified as their "greatest travel management challenge today" some aspect of getting travelers to comply.

greatest challenge, but—more than any other theme—buyers in this category generally cited the cost of travel as their biggest challenge. Yet, it was unclear what actions many were taking to combat price increases.

MULTIPLE HATS

"At larger companies, you're dealing with a multitude of people that touch T&E," said DeFranco. "At one company alone, you could have a travel manager, a director of procurement, a director of purchasing, expense management, HR and a risk manager. Inherently, the SMEs simply do not have the same infrastructure, so to compensate for that, the travel management company account manager essentially becomes an extension of the customer"

One midmarket respondent highlighted the biggest travel management

midmarket clients do have multiple roles within their organization."

According to the *BTN* Salary and Attitudes Survey results, 75 percent of respondents representing companies with less than \$2 million in U.S.-booked air volume devoted less than half of their working hours to travel management, compared with 6 percent of those at the biggest-spending organizations.

"The travel managers in these organizations really do juggle multiple priorities at the same time," said CWT's Wartgow. "Getting an opportunity to really invest the time to understand your travel program is a luxury they don't have. So giving them information that is consolidated, is simplified, is summarized in a way they can quickly access it, with some guidance on what the highlights are that they should focus on, is really valuable." 🗎



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Small Accounts Not Always Easy Business For Corporate TMCs



BY DAVID JONAS

THE SIZE OF A company's spend does not necessarily reflect its approach to managing travel. Although there are many generalities relating to policy, program configuration and supplier deals, each company may have a different set of needs and goals, and therefore a unique approach to working with a travel management company, online booking tool or both.

"We find that a company's culture and leadership environment are more of a factor than company size in driving needs and preferences," said Gant Travel Management president Patrick Linnihan.

PICKING THE TMC

It's not that the biggest agencies disregard smaller-spending accounts, but small and midsize agencies that fry few large fish

are happy to focus on smaller ponds.

"If you go with a mega [agency], and you are a smaller or midsize company, you do tend to get lost in the shuffle," said Sean Parham, director of procurement and sourcing at Corinthian Colleges, a post-secondary education company with about \$6 million in annual air spending (and another few million related to meetings). "I just don't feel like in the past I have gotten the attention from the larger ones. And there's also all the bureaucracy. It's nice to be noticed by your TMC and not just pushed aside."

But for TMCs, small doesn't always mean easy business. For starters, many SMEs do not have a dedicated travel management professional, which might mean TMCs have a tougher sell. When working instead with CFOs, controllers, HR personnel, administrators or assis-

tants, the agency has to decipher for those contacts how a travel program works and derives value.

"In a lot of those cases, they are going from a completely unmanaged program into a managed program, either through the launch of an online tool or an expense tool—or both together," said Balboa Travel Management executive vice president for corporate travel solutions John Cruse. "You have to continually show the value, because a lot of times people get hung up on the fees and not necessarily recognizing what is coming along with it."

Casto Travel COO and president Marc Casto views the SME segment as "much more challenging" than others. "Like in any company and in any industry, one of the factors we consider on the sales side is: Who is the decision-maker?" he said. "Among SMEs, the decision-maker

is manifold, and no one person holds the relationship or can execute or contradict the relationship between the TMC and the company. It becomes a necessity to play to the needs of multiple people at the same time.”

STRUCTURING A PROGRAM

Because they are less likely to directly employ a full-time travel professional and therefore more likely to outsource functions to the TMC, SME accounts may need consultation and some hand-holding. A key early challenge is determining what’s being spent on travel and where.

“First and foremost is to identify what the challenge is,” Casto said, adding that’s usually a combination of making the travel program more efficient, controlling costs and abiding by internal audit procedures.

He frequently notices that at SME clients, “travel is only lightly managed and the integration into back-office reporting systems is nascent, at best.

They also are less likely to have consolidation of their travel spend within one or even a couple of TMCs. It’s often an ‘anything goes’ type of environment.”

At Christopherson Business Travel, “smaller clients start with a bit less consultative account management services and as they grow we layer on more service bundles for them,” said CEO Mike Cameron. Those can relate to travel pattern analysis, program compliance and online booking adoption, savings opportunities with suppliers and duty-of-care considerations.

In terms of setup, most SMEs aren’t provided a dedicated TMC account manager. At Adelman Travel, “almost all” smaller clients are serviced by a shared corporate travel consultant team, each of which never exceeds eight people, according to president and COO Steve Cline. “All accounts regardless of size have unique objectives” and therefore require custom configurations and management support structures, he explained.

Support requirements may differ based on the account’s number of travelers, the nature of its travel, its travel policies and its industry sector, according to Gant’s Linnihan.

“For example, a company of 500 employees with \$800,000 in air spend, whose employees travel as technicians in the oil and gas industry, with detailed travel policy and supplier needs, might have support needs equal to those of a company with \$10 million in air spend,” he said. “Thus, small spend doesn’t necessarily mean small support requirements. Moreover, a president of an SME firm ex-

THE BOOKING TOOL

Arrangements for an SME account’s online booking tool also don’t seem as dependent on a program size as much as company culture and goals. While many—perhaps most—SMEs use an online tool through one of their travel management company’s reseller agreements rather than a direct contract, the same is also true at some larger companies.

At Balboa, Cruse estimated that about 90 percent of SME clients using an online booking tool do so through the agency’s reseller deals. “But we have seen people in that space and that size do direct agree-

Balboa’s John Cruse estimated that about 90 percent of SME clients using an online booking tool do so through the agency’s reseller deals. “But we have seen people in that space and that size do direct agreements, especially with Concur,” he noted.

ments, especially with Concur,” he noted. The decision often relates to Concur’s expense reporting product.

Answering the question about direct versus reseller deals, Casto said it’s “wholly a function of the client’s (irrespective of size) focus on automated expense management. If their focus in this is high, then they likely will seek a direct relationship. If not, it is very likely that it will be serviced under the agency reseller agreement.”

That’s the case at Corinthian Colleges, which uses Concur through its agency reseller deal, but is looking toward a direct deal. Parham said the organization first went the reseller route as a means to receive TMC support for online booking customer service—and also because it’s been using a homegrown Excel-based expense system. But now, Corinthian is considering Concur’s expense system. “When that takes place, and our contract through the TMC comes to an end, we

pects service equal to that provided to a large firm; having a high number of SME accounts requires a TMC to have a system capable of supporting a large number of executive travelers.”

Therefore, travel management company customer service is key for securing more modest programs, just as it is for larger ones, and important for retaining them. By their nature, small accounts can more easily switch providers when service lags.

“Smaller guys get a lot of the same access, a lot of the same tools and benefits,” said Balboa’s Cruse. “It’s tough to segregate because everybody just expects everything”

Corinthian Colleges’ Parham said that travel management companies “learned years ago that what sets them apart from everybody else is customer service and technology. Especially on customer service, if they can’t deliver I’ll go to someone else.”

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will look at the idea of having [Concur] host the entire thing,” Parham said. He noted that without any policy mandates, online booking adoption at Corinthian is around 80 percent.

For SMEs using booking tools furnished through reseller deals, the TMC typically handles site administration and support. “The TMC also sets the price a corporation would pay, either directly for the OBТ or bundled into some other fee such as online booking and fulfillment,” according to Yannis Karmis, vice president of Sabre Global Corporate Solutions, which includes the GetThere corporate booking tool. “When contracting for an OBТ through their TMC, the TMC provides client support for the tool. TMCs have different models for this, including allocating headcount or providing a pool of available hours. OBТs have similar support models where we provide ongoing support based on hours, dedicated headcount or monthly maintenance fees.”


Karmis noted that smaller firms “typically have more modest requirements”

[than larger ones], noting a lesser need for multilanguage capabilities, “multiple subsites” or “specific workflow and business rule requirements.” As such, implementation is easier. But support, Karmis added, varies by number of travelers, worldwide office locations, country-specific customization and number of agencies used: “In short, the more variable the requirements—often a proxy for size—the greater the support that is needed.”

ALTERNATIVES

About a decade ago, online-originating agencies Orbitz for Business, Expedia Corporate Travel and Travelocity Business began making inroads with smaller-spending accounts (and eventually some very big ones), and brought new competition to traditional TMCs—both megas and the more modest-size service providers. Those three players still exist (with the latter two under a different brand name and different ownership, respectively), but now there is a new breed of systems available to those interested in a “travel management-lite” tool.

Rocketrip, for example, challenges travelers to beat what it determines to be fair market rates and uses emailed itineraries from travelers to enable clients to keep tabs on spending and employee whereabouts. Similarly, TripScanner monitors off-channel bookings to determine potential policy violations, provides reports and uses online travel search engines, including tripBam, to look for prices cheaper than what initially had been booked. It alerts travelers and travel arrangers when better deals are found. TripScanner recently struck a deal with Hickory Global Partners, a network of agencies that serves many smaller accounts.

TripScanner founder and CEO Ethan Laub has stressed that his product complements an organization’s use of a TMC, but in cases in which a TMC is not used, TripScanner will pursue direct business. “A lot of the small businesses that I speak to, they might have a dozen or two dozen travelers, and at this point they’re just not ready to take this leap and adopt a full managed travel program,” Laub said. “This is kind of a gateway.” 



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SME Sourcing Opportunities Endure As Corporate Travel Demand Recovers



BY MICHAEL B. BAKER

EVEN WITHOUT THE leverage of the largest travel buyers, small and midmarket companies have opportunities for savings and sourcing strategies across the three major travel categories of air, lodging and car rental.

Industry consolidation and tighter financial controls have made airlines a tough segment for SME buyers, while car rental vendors remain eager to get them to the table. Hotels continue to enjoy what has been a lengthy seller's market, but that paradoxically might present an advantage to some SME buyers at the expense of

larger buyers with programs busy hotels no longer may wish to accommodate fully.

At the very least, even the smallest buyer usually can find a key supplier among those categories open to discussions for small discounts or traveler perks. For midmarket programs with significant volume, many of the same strategies employed by large-market buyers can be effective, although execution requires a solid grasp of travel program data.

AIRLINES

Managed airline programs remain a challenge for SME buyers, with the negoti-

ating table largely out of reach to those outside the higher end of the SME spending spectrum. Others have turned to specialized SME programs offered by airlines, although some buyers say driving value from those programs also is difficult.

Generally speaking, for North American markets it takes more than \$500,000 in annual business for an airline to be willing to negotiate with a buyer, Advito vice president Bob Brindley said. Buyers with more than \$10 million in annual U.S. air volume often are able to negotiate discounts across multiple carriers, he added.

"Most of our clients north of \$2 million

in air spend have an airline relationship, a preferred agreement with an airline,” said Mark Walton, vice president of strategy and account management for Orbitz for Business. “They may not have the same deal points as someone spending \$100 million, but if you can have the data points and the business acumen to negotiate and can represent an opportunity for yield or marketshare improvement, you’re going to be able to get their attention.”

Airlines will take into consideration more than overall volume. An airline is more likely to negotiate with a company offering a relatively higher proportion of volume in a very competitive market versus the same volume in a high-demand market or one in which a single airline dominates, Brindley said. Similarly, airlines will be more eager to negotiate with a company that offers a high amount of premium-class travel, even if the overall total is small, as opposed to a larger volume of economy-class-only fares, he said.

Dart Container Corp. travel manager Cheryl Benjamin said she’s able to leverage a little additional clout with airlines thanks to her company’s status as an ARC-certified Corporate Travel Department.

“It is still a hard category to negotiate, but contracting directly gives us a little more leeway not so much in the actual dollars but in the soft-dollar things, like a better working relationship with my account rep,” said Benjamin, who also chairs the CTD Association. “My discounts have remained pretty stable over the years, which has been a bonus.”

Other buyers have had a tougher time. Jerry Richerson, strategic sourcing director for Stewart Title Guaranty Co., said it took him two weeks just to find the right contact at one airline with which he needed to negotiate.

“The airlines that will talk to us have basically said that, since we don’t have a TMC, the best they can do is give us a 2 percent discount contract,” he said. “Most travelers are savvy enough that they can go online and find a 2 percent discount themselves.”

Even so, Richerson said he takes those discounts when he can get them and posts them to the company’s travel site, although their use is not mandated.

Pattie Harris, travel manager for mid-market clothing retailer Oxford Industries, faces similar difficulties, saying during a March conference in Atlanta convened by The BTN Group that finding discounts with airlines related to her company’s spending level is “virtually impossible.” Ancillary fees are compounding Oxford’s airline spending levels—which she hopes eventually will offer her more leverage in negotiations—but for now, her travelers depend more on the best fare of the day rather than negotiated contracts, she said.

Success also varies by market. Corinthian Colleges director of procurement and sourcing Sean Parham said that although his organization’s spending generally is not enough to garner much attention from airlines, he was able to negotiate a “nice contract” with Delta. Being based in Southern California proved a bonus as Delta looks to grow its share at Los Angeles International Airport, he said.

“You have to rely on the relationships that you have fostered over the years with account managers and executives and hope that your market is a market they’re focusing on,” he said.

As a whole, SME negotiations with airlines are getting tougher, not easier, said Kevin Maguire, director of travel for intercollegiate athletics at the University of Texas. The American Airlines-US Airways merger, changing frequent-flyer status requirements and new fees and fares all are making negotiations a “crapshoot,” he said.

“Things are changing so much,” Maguire said. “Every day, they come up with some new wrinkles, and they have a tendency not to honor the old wrinkles.”

Airlines outside of North America pose even tougher negotiations, according to Advito’s Brindley. Whereas in the United States discounts are set for specific geographic destinations or hub markets versus non-hub markets, airlines in Asia and Europe often set discounts based on

volume between individual origins and destinations, setting the barrier to entry even higher.

“You could have \$50 million in airline spending on a global basis, but if you have less than X euro between Frankfurt and Paris, you’ll have a very hard time in getting airlines interested in making an offer,” Brindley said.

When negotiations are not an option, small and midmarket buyers also have as a resource airline-provided small business programs. Legacy carriers offer points-based programs—American Airlines Business Extra, Delta SkyBonus and United PerksPlus, for example—in which company travel earns points toward travel rewards and other such perks as upgrades or lounge access.

Stewart Title’s Richerson said he has signed up for all such programs when applicable, although managing the programs in a nonmandated environment has dulled their benefits. They also create some level of confusion among travelers who are not aware that they can still earn points toward their own personal rewards programs while using them, he said.

Oxford’s Harris said redeeming points from those programs also is becoming more difficult.

“As consolidation continues, there are fewer seats available,” she said. “So, you sit there with lots of points but nothing you can do with them.”

Even so, such programs are “better than no program at all” and can provide some soft-dollar benefits, Brindley said.

Corinthian Colleges’ Parham said he’s had the most success with American’s Business Extra, because of its flexibility and rate of rewarding points. To maximize their value, he set a threshold of \$800 as the lowest-cost fare for which the institution would opt to use points.

“If you look at the value of the points versus the value of the flights, it may not work out sometimes,” he said. “If it’s over \$800, then I feel we are actually getting our value back for the money we spent to

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earn those points?”

Airlines also have had mixed levels of success with booking portals for small and midsize business. Southwest Airlines' Swabiz product endures, but some legacy airlines shuttered similar portals over the years. More recently, JetBlue Airways last year announced a partnership with booking supplier nuTravel to upgrade its small-business air-booking portal, which remains a work in progress.

HOTELS

Negotiated hotel deals in top-volume destinations are within the grasp of most small and midmarket travel buyers, and evolving technology and shifting hotel priorities are enabling some buyers to develop more sophisticated programs.

Alison Galik, senior vice president of operations at hospitality spend management company Lanyon said the firm in 2013 saw a 23 percent growth in SME clients—which it identifies as a program with 150 or fewer hotels—compared with 2012. Such clients “typically start out as a more regional or local type of program and then start to spread,” she said. “They might have the global business, but they’re not ready to go out and manage it yet.”

They also tend to come from a “manual program,” in which they contact hotels directly using the phone, email and spreadsheets, she said.

That’s where Stewart Title’s Richerson is now. He has individual hotel agreements primarily near his headquarters office and around affiliate offices, he said. He plans to take a closer look at his spending to see where else he has sufficient room nights to leverage deals, perhaps with the help of a request-for-proposals service supplier, he said.

Dart’s Benjamin also has fostered relationships with hotels near her company’s production facilities, largely with mid-scale properties. Through those relation-

ships, she for the most part has avoided significant rate increases even in the current seller’s market, she said.

“We’ve heard about enormous increases, but we’re not finding that as much with the hotels with which we have established good relationships,” Benjamin said. “It’s give and take; you want to be sure that you’re not asking for so much of a discount that they’re not making any money off of it.”

For smaller companies, such negotiations might be an informal process as opposed to an annual RFP process, CWT Solutions Group senior director of North America Joel Wartgow said.

“Some people get a little frustrated with the annual hotel RFP processes, so for some smaller companies, do you need to do that every year, or can you manage

companies now are opening more chainwide deals to smaller clients than they have before, Brindley said.

For one, SME buyers can actually be a more attractive proposition for hotels than large buyers in a strong seller’s market, he said.

“Every once in a while, you get in a situation where a client is too large, and a hotel can’t afford to give up that much of their inventory at a low rate,” Brindley said. “Sometimes big can be too big, which is why big meetings pay a premium over the transient rate.”

At the same time, hotels during the past several years increasingly have pushed dynamic pricing programs in lieu of fixed-rate programs. Corinthian Colleges’ Parham, who manages a program of about 150 hotels, said Hilton in particu-

Hotel companies now are opening more chainwide deals to smaller clients than they have before, Advito’s Bob Brindley said. For one, SME buyers can actually be a more attractive proposition for hotels than large buyers in a strong seller’s market.

your program a little more strategically?” he said. “Maybe it’s less structured and you just reconfirm with them every year.”

Advito’s Brindley said such agreements make a good foundation for SME hotel program management. Chainwide deals can supplement programs in markets without significant volume, as can spot-buying to take advantage of off-season and off-peak rates, he said.

Like airline contracts, chainwide hotel agreements traditionally have been tougher for SME clients to get, compared to deals for larger buyers. Richerson said The Blackstone Group—owners of hotel chains including Hilton Hotels Corp. and La Quinta Inns and Suites—is the primary owner with which he does business, “but they won’t talk to us about the national footprint,” he said. Even so, hotel

lar has been looking to spread that model across his program.

“They are saying it would be easier for us and we’d see a higher adoption and compliance in our program,” he said. “Because it’s a percentage off best-available rate, I can’t really say where I’m going to fall in my budget, so I don’t see it yet.”

Sophisticated SME hotel programs also should have some degree of monitoring for rate integrity, Brindley said. As companies like Lanyon target SME buyers, automating those tasks is becoming more commonplace among the set, Galik said.

“Not only is the technology available, but there has been a shift toward financial control,” Lanyon EMEA managing director Roland Tanner added. “Companies that may have seen travel as a miscella-

CONTINUED ON PAGE 26

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CONTINUED FROM PAGE 24

neous expense can see how much of an expenditure it is and are able to manage and track it with tools.”

CAR RENTAL

While some airlines and hotels might give small and midmarket buyers the cold shoulder, suppliers in the car rental space appear much more eager to court them.

Even in an industry that during the past several years in the United States has consolidated to three major suppliers, car rental companies have struggled to make much progress in pushing commercial rates higher. During Avis Budget's conference call to discuss fourth-quarter 2013 financial performance, president and CEO Ronald Nelson said he saw as a remedy small and midmarket clients, who on average pay a higher rate than the largest corporate customers.

“The opportunity for us that will have the most immediate impact is changing the mix of our commercial business and

being more aggressive on midmarket and more aggressive on small business,” Nelson said. “[That] will effectively average down the large commercial contract base that's winding through.”

Focusing only on rates can be counterproductive in a car rental program, Advito's Brindley said. While SME buyers might be able to save on car rental rates via spot-buying, they could end up paying for it in other ways. Just looking for the lowest rate usually would end in a subcompact car at an off-airport location, he said.

“You want to avoid potential increased level of time and hassle to an employee,” he said. “For what you're paying by spot-buying compact cars, at a similar rate you could be getting bigger cars with an increased level of service.”

Dart's Benjamin said the car rental space, more than any other, requires an evaluation of service above all else. In North America at least, most vendors have the same general airport locations

and, particularly as consortia including CoreTrust get into the discount arena, don't vary that widely on price.

Those services also are what will drive compliance, she said. “If you as a travel manager can sign an agreement where they get that complimentary gold service, and all travelers can get that counter bypass, you're a hero,” Benjamin said.

Stewart Title's Richerson said he was able to negotiate a deal with Avis Budget that was “really good for the amount of spend we have out there.” He also was able to negotiate insurance coverage into the rate, and Avis also matches loyalty levels for travelers who have status with other car rental vendors, he said.

His goal is to broaden compliance among his travelers, in part through a new communication strategy.

“We've had some success, but Avis would like to see more, as would I,” Richerson said. “Right now, they have probably 65 percent of our spend; I would like to see [the company have] all of it.”



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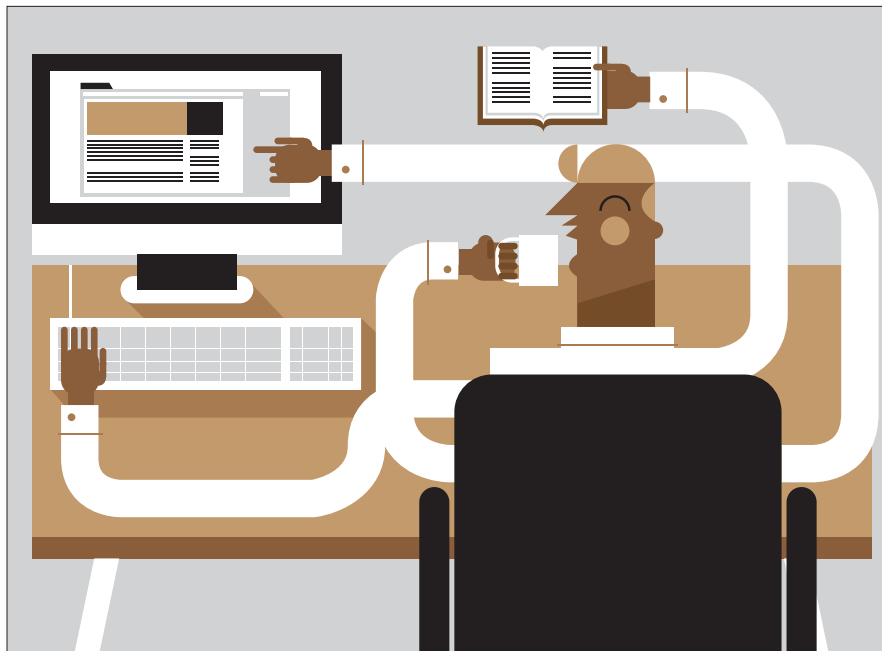
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For SMEs, Payment Options Blossom



BY JoANN DeLUNA

“IT’S ME,” said Valerie Fender, Blackboard senior manager for corporate travel and expense, when asked how many people comprise the education software company’s travel management team. “You’re talking to the travel and expense management team.”

Although Fender was partly joking—she gets support from the IT and treasury departments should she need it—she solely is responsible for anything travel management-related. Blackboard has approximately 1,300 business travelers and annually spends less than \$12 million on U.S.-booked air travel. “It’s not a huge budget, but it’s definitely something we want to control,” Fender added.

On the expense management side, some travel managers are implementing expense systems and corporate card programs that can help them gain insights into spending and travel patterns, which then can lead to the creation of more efficient travel policies.

Likewise, suppliers also have become more savvy in understanding the specific needs of SMEs and in leveraging their resources to offer SMEs more afford-

able solutions. For example, Concur four years ago began offering SMEs in the United States specific expense management solutions, and recently expanded those offerings to Australia, Canada and the United Kingdom. Additional markets are to come, according to Elena Donio, Concur executive vice president and general manager of small and mid-size businesses.

“Problems exist whether the company is big or small,” said Donio. “We’ve taken all the knowledge and insights from all our configurations of our thousands of clients globally and asked, ‘What are the most common setup principles?’

“We finally got to the point where it was technically and financially feasible for the customer and for us to rethink the product strategy, pricing model and delivery of [our products],” she continued.

LEVERAGING CARD SPEND

Some SMEs depend on their travel management companies to help them gain discounts. Hair product firm Oribe Hair Care, which has about 75 frequent travelers, in 2008 decided to work with TMC Tzell Travel Group to “leverage the

economies of scale,” said Oribe CFO Sid Katari. “We could’ve easily brought in someone full-time to manage our travel, but we wouldn’t have been able to leverage the discounts.”

Similarly, Sempra Energy “piggybacks” on American Express Global Business Travel’s discount program as one way of getting “certain airline and hotel discounts,” according to Sempra Energy travel services administrator Jessica Davis. “It’s definitely harder for us to get chainwide discounts because our overall spend with one chain doesn’t meet its minimums.”

Blackboard, Oribe and Sempra all issue corporate cards to employees. Sempra has a direct-bill/company-paid program for employees and a ghost card for temporary employees to pay for expenses up front, as well as a rebate program. “We’ve been trying to route as much activity to these company-pay cards to bump up our spend and increase our rebate,” Davis said. “We were able to get a pretty good chunk this past year by doing that.”

While Blackboard and Sempra allow employees to sign up for membership rewards programs as a personal expense, Oribe pools American Express reward points. “In the past individuals were keeping that benefit for themselves, but now we’re at a size where all those points accumulated can be reinvested in the business to subsidize travel and get even more cost savings,” Katari said.

U.S. Bank in March extended its FlexPerks Travel Rewards program—previously available only to consumer-card holders—to commercial-card clients. American Express last year began offering a membership rewards program allowing small businesses to pool company points.

Both Blackboard and Sempra have considered disallowing employees from collecting points, as foregoing reward redemption can improve corporate rebates, but each agreed that reward programs are a good way to incentivize travelers to sign up for the card scheme.

The more data they collect, the more insight they have on spend. “If we deny them [the points], then there’s less incentive for them to use the program,” explained Davis, whose program is not mandated.

“If they can’t have the points, then they’d rather use their personal cards,” said Blackboard’s Fender.

To save on currency conversions, Blackboard also is prioritizing locally issued cards for overseas-based employees and frequent international travelers. Fender also finds chip-and-PIN cards for overseas travelers “absolutely necessary.”

EXPENSE REPORTING

While a card program helps businesses capture data by noting what and where travelers are spending, U.S. Bank travel product manager Mary Miklethun said that “even with that data, oftentimes the numbers don’t add up to enough spend to give them opportunities to negotiate rates with preferred suppliers.”

However, Miklethun said companies can adopt other tactics to manage travel spend, including implementing an automated expense reporting tool. Integrating an expense tool with a corporate card or a one-card—which combines at least two commercial card products—makes it easier for travelers to use the card and file expenses, she said.

“You don’t necessarily need to hold off points,” Miklethun explained. “It’s more about making their life easier so those transactions are already populated in the software and they don’t have to hand-key and manage receipts to do expense reporting.”

Using existing resources, research and infrastructure, Concur developed product templates that were less intricate but maintained the most common principles of its travel management tools—thereby making them more affordable for SMEs, according to Donio.

For example, Concur noticed that SMEs tend to conduct more business domestically or regionally, unlike larger enterprises that might do more global or

multinational business. This reduces the need for unique and tailored configurations that increase the tools’ cost. Fewer configurations also means faster implementation, claimed Donio.

Blackboard is preparing to launch by April Concur Travel and Expense, and plans for lodging to experiment with Trip-Link—Concur’s “open booking” platform. While Fender said airline discounts have declined, and she questions the value of negotiating airline agreements considering the agency fees necessary to fulfill those agreements, she doesn’t believe “there are better deals to be had off of the GDS.”

Lodging, however, is a different story. By manually comparing agency data and corporate card data, Fender said it’s “very clear” that “people are finding lots of places for better deals off the company channel for hotel stays.” Consequently, Blackboard will begin to allow hotel bookings outside company channels. Fender is hopeful that once Concur is up and running, she will be able to view more easily the average rate of in-program versus off-channel hotel bookings.

“We’re trying to save money,” she explained. “I can’t make that claim and then say, ‘No, you have to book here even though I see it’s double.’ If you’re not going to be sensitive to that, then you don’t have a lot of credibility.”

Oribe in February implemented Concur Expense. As it integrates with Tzell data, Katari said he’s been able to establish a return-on-investment metric for individuals: how much profit individuals generate via a trip compared with how much the trip cost. While Oribe hasn’t yet begun using this calculation to influence employee behavior, Katari said he hopes employees eventually will be incentivized to be more “frugal” if they know they’re being measured on their efficiency rating. “Maybe they’ll adhere to policies better,” he added.

OTHER BANK SOLUTIONS

Banks and card networks also provide programs specifically targeted

to SMEs, featuring discounted prices from the types of suppliers they most frequently use.

Visa’s Savings Edge program provides discounts to SME debit or credit card holders at more than 50,000 hotels and more than 14,000 brick-and-mortar retailers for dining, transportation (excluding airlines), airport parking, electronics, office supplies, fuel and other business expenses. Discounts vary among merchants. For example, users can save 5 percent on airport parking, 10 percent on an airport shuttle and 1 percent on fuel at Texaco and Chevron.

Hotel discounts include such brands as Ramada, Howard Johnson, Super 8 and La Quinta, “hotels where SMEs tend to stay, because they’re cognizant of cost,” said Visa head of small business products Janet Zablock. The solution is available through most major banks, including Bank of America, U.S. Bank and Wells Fargo, as well as JP Morgan Chase’s Ink and Capital One’s Spark bank-branded programs.

MasterCard has a similar program, Easy Savings, which is offered through most major banks and provides SMEs with automatic rebates when MasterCard cardholders book travel, dine or buy gas at participating merchants. MasterCard also has the three-module and cloud-based MasterCard Network, powered by Rearden Commerce’s Deem commerce platform. With it, SMEs can manage travel bookings, create travel policies, manage dining invitations for clients, set dining preferences through OpenTable and create basic expense reports. Both programs are free of charge for MasterCard holders.

“It’s really important [for travel managers] to be open-minded and not be dismissive of newer ideas that come along, because travel management has changed so much and will continue to change—it’s certainly not done the way it was 10 years ago; not 20 years ago,” said Blackboard’s Fender. “The role of the travel management company is changing. Everything is changing.” 🔄

SMEs Eye Structured SMM Programs



BY SARAH BEAUCHAMP

SINCE SMALL AND midsize businesses generally have fewer resources than larger corporations, they typically manage their meetings a little differently. While some bigger companies have at least some elements of a centralized strategic meetings management program in place, most smaller enterprises do not. Many smaller companies don't have a dedicated meetings management team and still rely on basic technology to plan events. However, many are beginning to see a need for centralized management, and some are starting to plant the seeds of SMM initiatives.

Lodging technology and meetings management company Lanyon last year released a report that found most small and midsize businesses manage meetings internally, with about 11 percent using third parties and 27 percent using professional sourcing tools. Most SMEs manage every step of the meetings process—from sourcing to managing contractual deadlines—on their own.

“If you look at the average spend per meeting, medium-sized companies show to be the least efficient,” said Lanyon senior vice president of strategy and product management Anthony Miller, citing a 2010 PhoCusWright report that revealed the average per-meeting spend for midsize

companies was about 10 percent to 15 percent higher than companies of other sizes.

“There are so many opportunities for saving money and improving efficiencies,” Miller added. Lanyon plans to announce this year an SMM platform geared specifically to midsize organizations, he said.

At Rotary International, a midsize humanitarian organization, the meetings team is responsible for the sourcing and logistics of many company events, while content is left up to individual departments. “We’re in the process of developing [an SMM program],” said director of meetings and events L.J. Williams. “We certainly see a need.”

In order to track spend, Rotary employees currently check in with the budget manager, reporting on their individual line items in order to create monthly spend forecast reports. Williams’ team collaborates with four departments, including registration and housing, operation services, the stage department—which is responsible for speakers and entertainment—and meetings logistics, comprised of two meeting specialists who manage transportation, food and beverage and volunteers.

SMEs without dedicated meetings departments, such as Goodman Networks and Hexagon Metrology, manage events

within the company’s travel department, leaving most of the logistics up to the budget holders and handling only certain aspects of meetings, such as sourcing and contracts. Karen Hatch, Goodman Networks’ director of corporate travel, implemented a meetings policy last year. “We have a meetings team within my department, and we definitely have gotten our arms around a lot of the spend with meetings,” she said. Beginning in the second quarter this year, Adelman Travel Group will handle meetings sourcing and negotiations for Goodman.

Hexagon Metrology strategic projects manager for North America Bridget Benedetti, who handles all transient travel and expense reporting for that segment, keeps track of the meetings schedule with a Microsoft Outlook calendar shared among senior management. “We also have a rule that mid- or senior-level managers or vice presidents have to let the CEO and myself know in advance when 10 employees or more are gathering for a meeting,” she said.

While midsize companies spend more, smaller companies with tighter budgets focus more on the value of each meeting, often opting for “more value-based packages, like prenegotiated deals that hotels offer,” according to Hervé Sedky, owner of Klio Travel Ventures and formerly senior vice president of American Express Global Business Travel, which included Amex’s meetings and events division. Sedky has observed that smaller companies generally consider service and flexibility of greatest value, while “larger companies value savings and risk mitigation the most,” he said.

Since many small and midsize organizations don’t implement SMM plans, they often don’t invest in events management technology, but Sedky sees this changing “as technology evolves and is more adapted to the middle market,” he said. “A lot of solutions are targeted to large companies, and not built from the ground up for small companies, and I think that’s going to change.”

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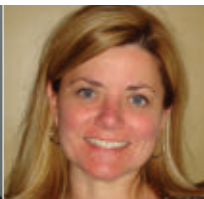
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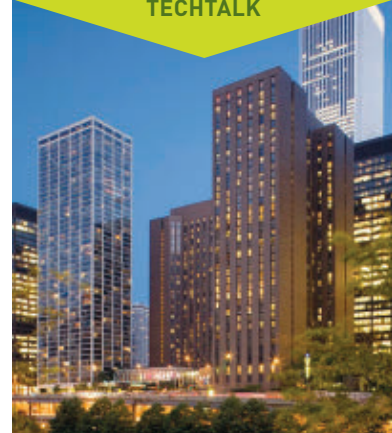
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