



October 27, 2014

BusinessTravelNews

TRAVELER SERVICE QUALITY



A BTN Research Report

ASSESSING THE IMPORTANCE AND
DELIVERY OF AIRLINE, HOTEL,
CAR RENTAL AND
TRAVEL AGENCY SERVICES

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Quality traveler service is a hallmark of Southwest Airlines. As the sponsor of this issue, we applaud *Business Travel News* for taking a deep dive into the issues and creating a resource that highlights the importance of servicing the business traveler across all touch points of a business trip. From supplier services to internal corporate services, business travelers work better when they are well supported.

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Traveler Service Innovation Abounds, But Fundamentals Still Key



BY CHRIS DAVIS

BUSINESS TRAVELERS today are in the midst of one of the great evolutions of travel service delivery. Suppliers have taken advantage of travelers' near-unanimous adoption of mobile technology to deliver products and services—mobile boarding passes, complete mobile itineraries—that even a decade ago would have been hard for those travelers to imagine. And there's more to come, with services like expanded location-based offers and the ability to unlock a hotel room door with a phone in the works.

By and large, these mobile-based services have been embraced by travelers eager to streamline the travel-booking process and sidestep a long line or two. But what remains clear, according to the results of *Business Travel News'* Traveler Service Quality survey of travel manag-

ers and travelers alike, is that no amount of technological innovation outweighs the basics of traveler service—an on-time flight, a clean room, an easy rental car return process, and polite staffers who know the answers to questions.

BTN this year asked hundreds of travel managers and frequent business travelers to detail the services provided by airlines, hotels, car rental companies and travel management companies that were most important to them, and how effectively their primary suppliers delivered those services.

Buyers and suppliers alike generally indicated that the services most important to them are those that for decades have been suppliers' main value propositions: airlines that promptly deliver baggage; comfortable, well-lit hotel rooms; accurate travel documentation and friendly employees. While there are some nods

to modern living—travelers and buyers both consider free in-room hotel Internet access to be more important than just about anything else, for example—the survey found that it's the fundamentals that matter most.

And how have suppliers fared in delivering their core services to the respondent buyers and travelers? Generally speaking, decently. Both categories of respondents were asked to rate on an ascending scale of one to six their primary travel supplier's delivery of individual service aspects, and the average response of both respondent categories for most services fell between four and five, with most in the upper half of that range. There certainly is some room to grow for suppliers in terms of travel managers' and travelers' perceptions of their ability to deliver on their promised services, but

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such scores as an aggregate representation of hundreds of respondents is not bad. Suppliers likely will be happier to see that wide majorities of travelers—in every category, at least 85 percent of them—indicated they would recommend their primary travel supplier to their fellow business travelers.

METHODOLOGY & DEMOGRAPHICS

Business Travel News' Traveler Service Quality research report was designed to elicit the opinions of travel managers and business travelers as to which services of four categories of suppliers—airlines, hotels, car rental companies and travel management companies—were most important to them, and how they felt about the delivery of those services by their primary suppliers.

Business Travel News from July to October 2013 conducted the survey through Equation Research after developing questions for it earlier in the summer.

A direct link to the online survey was emailed to members of The BTN Group Advisory Board and some subscribers of *Business Travel News* and sibling publication *Travel Procurement*. Equation invited members of its own database of business travelers to participate.

The survey included multiple-choice questions as well as requests to rate the importance of specific travel supplier services on an ascending scale of one to six (with one meaning “not at all important” and six meaning “extremely important”).

Respondents also were asked to rate their satisfaction with the delivery of specific travel supplier services by their primary supplier, again on an ascending scale of one to six (with one meaning “falls short of expectations,” and six meaning “exceeds expectations”).

Travel manager respondents and traveler respondents were offered different

Methods Of Communicating Internally About Travel Supplier Service Issues

	Managers	Travelers
Email	87%	74%
Corporate intranet	41%	35%
Phone	41%	52%
In-person meetings	36%	45%
Traveler survey	23%	27%
Newsletter	14%	26%
Social media	6%	30%
Other	5%	0%

Note: Travel managers were asked how they communicate with travelers; travelers were asked how they communicate with their companies.

Source: A BTN July–September 2014 survey of 368 business travelers and 178 travel managers

options for rating, although some options were identical.

Neither travel managers nor traveler respondents were asked to identify their primary suppliers in any category, nor were they asked to rate individual suppliers' services.

Equation tabulated all responses. A total of 166 travel managers, buyers and others who indicated they hold travel management and/or purchasing responsibilities as part of their job functions

respondents indicated they worked for an organization that had a travel department and/or a travel manager, while 41 percent said they did not, with the remainder indicating they did not know.

Among buyer respondents, 31 percent indicated their organization's 2013 U.S.-booked air volume was less than \$2 million. About 13 percent indicated that volume was between \$2 million and \$4.9 million, with 15 percent indicating it was between \$5 million and \$11.9

million. About 17 percent of respondents said their organization's 2013 U.S.-booked air volume was between \$12

million and \$20.9 million, with 8 percent indicating it was between \$21 million and \$29.9 million, and 16 percent indicating it was more than \$30 million.

Business Travel News editors discussed some survey findings as part of interviews with buyers, travelers and suppliers conducted in September and October; those interviewees may or may not have participated in the survey.

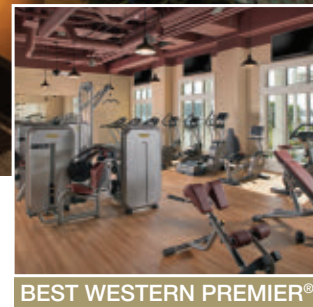
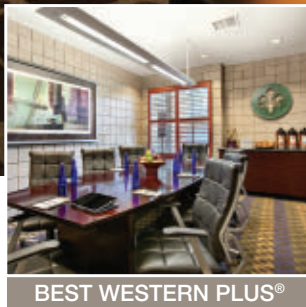
Business Travel News thanks all of those who participated in the making of this report.

There are some nods to modern living—travelers and buyers both consider free in-room hotel Internet access to be more important than just about anything else.

responded to the survey, as did 368 business travelers.

Not every respondent answered every question; partial survey responses are included in the tabulation.

All 368 business traveler respondents indicated that they within the prior 12 months had taken at least five business trips by air. About 44 percent of the total indicated they had taken at least 10 business trips within that time frame, and about 9 percent indicated they had taken at least 30. About 57 percent of all



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People-Oriented Services Critical In Assessing TMC Performance



BY DAVID JONAS

TO MEET THE NEEDS of client managers, buyers and travelers themselves, travel management companies must perform a wide variety of tasks. They should find favorable fares and rates, effectively integrate technology, watch for trip disruptions, maintain reliable communication with travelers and truly partner with clients to adapt programs. But they also must get the basics right.

According to *BTN's* latest service quality research, the degrees of importance placed on various service attributes outweighed the degrees of satisfaction measured among buyer and traveler respondents. That may suggest TMCs must do more to meet expectations.

In comparing their sentiments, travel buyers on average and in general placed greater importance than travelers on most TMC service areas covered by the research. There are, however, no generaliza-

tions to be made on which group scored TMCs better on their performance.

Generally, criteria related to a TMC's staff were of greater importance than other areas, for both travel buyers and travelers themselves. Those findings reinforce the familiar notion that corporate travel management, while increasingly about automation and self-service, remains a people-oriented business.

Travelers rated two components of this area in their top four among all 13 importance measures (which were rated on an ascending scale of one to six). Buyers rated three TMC staff areas in their top four among all 20 of the importance measures they were asked to assess, including "responsive staff," which had the highest aggregate importance rating for any TMC evaluation criteria. Buyers also generally and comparatively expressed satisfaction with their primary TMC's performance in this area. Though the level of importance buyers placed on "professional/po-

lite staff" specifically was not as high as other TMC staff assessments, it was there that TMCs earned their overall highest average satisfaction score.

Based on surveyed buyer sentiments, TMCs fell down a bit in the key category of finding the lowest possible fares and rates, with a nearly one-point gap between the level of importance and satisfaction with performance. The buyer satisfaction rating for TMCs' performance in guaranteeing fare accuracy also was notably lower than the importance rating.

TECHNOLOGY

In terms of technology, travelers on average assigned a 4.96 importance score for their TMCs' provision of "effective online booking support," and TMCs nearly lived up to expectations, with travelers' aggregate satisfaction score in that area only marginally lower.

Among buyers, TMCs also performed

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Source: DOT Air Travel Consumer Report, 2/2014, p. 5 (on time rankings) and p. 32 (domestic enplanements). Delta's 2013 domestic on-time arrival rate was 84.5% and our closest competitor's was 81.5%. Based on Delta's total domestic 2013 enplanements, this difference equates to 3,033,858 passengers. Competitive set defined as US Global Network Carriers: American, JetBlue, US Airways, United/Continental and Southwest/AirTran.





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comparatively well on technology issues. Two of the few outperformances in the survey (where satisfaction scores beat importance scores) were calculated in this area: for providing or reselling a self-booking product and for providing remote conferencing tools (though the latter was deemed by buyers as the least important among TMC survey attributes).

In terms of supporting mobile applications, buyers ranked their satisfaction with TMC performance within two-tenths of a point of the importance score. That area, of course, is of growing interest for travelers.

“Mobile has forced all of us to think about what really is essential,” said Egencia CTO Sravana Kumar Karnati, speaking this month at The Beat Live conference in New Orleans. “For us, mobile-first is the paradigm we use. Business travelers are expecting the same kind of experience that they are used to elsewhere—whether leisure travel, or any other application in any other domain.”

Also speaking at The Beat Live, BCD Travel director of strategic marketing Miriam Moscovici suggested that TMCs must establish better links between reservations centers and client travelers on the road. “There’s an automated message that reminds a traveler to check in, but there are cases where the agent needs to speak with the human and get an approval or get them to do something,” she said. “We need to leverage that same technology.”

KDS CEO Dean Forbes agreed, contending that the pursuit of end-to-end solutions must come from TMCs. “They are the only ones who can interweave technology and people in a just-in-time fashion,” he said.

STAYING IN TOUCH AND KEEPING WATCH

Travel technology generally and the mobile experience specifically can address communication needs. In some of those areas, TMC services are particularly important and TMC performance is fairly

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Importance Of Travel Agency Services And Satisfaction With Primary Agency Performance

Rated on a scale of one to six, with one meaning “not at all important” and “falls short of expectations,” and six meaning “extremely important” and “exceeds expectations”

Buyers

	Importance	Satisfaction With Primary Supplier
Has responsive staff	5.72	4.88
Has knowledgeable staff	5.67	4.83
Provides high-quality service to travelers	5.63	4.80
Has available/easy-to-contact staff	5.58	4.72
Provides good value overall for the price	5.55	4.51
Finds the lowest possible fares and rates	5.53	4.60
Guarantees fare accuracy	5.53	4.67
Has professional/polite staff	5.52	5.08
Provides timely information on itinerary and changes	5.51	4.71
Provides 24-hour emergency service	5.46	4.56
Provides effective online booking support	5.17	4.61
Provides timely travel alerts for emergencies	5.09	4.86
Supports traveler tracking	4.99	4.69
Provides VIP service for senior staff	4.82	4.77
Supports mobile applications	4.53	4.36
Provides or resells a self-booking product	4.45	4.69
Has international rate desk	4.43	4.54
Helps travelers secure upgrades	4.17	4.28
Provides emergency medical service	3.04	4.61
Provides remote conferencing tools	2.81	4.01
Will arrange employees’ leisure/vacation travel	2.78	4.21

Travelers

	Importance	Satisfaction With Primary Supplier
Provides timely information on itinerary and changes	5.00	4.83
Provide accurate, timely ticketing/documents	4.99	4.86
Has responsive staff	4.99	4.77
Has available/easy-to-contact staff	4.98	4.80
Provides effective online booking support	4.96	4.82
Finds the lowest possible fares and rates	4.95	4.75
Provides 24-hour emergency service	4.90	4.65
Has professional/polite staff	4.88	4.76
Has knowledgeable staff	4.87	4.79
Provides high-quality service to travelers	4.86	4.67
Helps travelers secure upgrades	4.80	4.69
Provides timely travel alerts for emergencies	4.74	4.60
Provides assistance with leisure/vacation travel	4.42	4.47

Source: A BTN July–October survey of 168 business travel managers and 250 frequent business travelers

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good, according to survey respondents.

For example, the two attributes garnering the highest importance scores from travelers were providing timely information on itinerary and changes and providing accurate, timely ticketing/documents. In both cases, the average performance scores from travelers were less than 0.2 points lower.

Providing such routine documents and notifications is one thing, but being positioned to effectively assist during emergencies is another. TMC performance in providing timely travel alerts during emergencies earned one of the highest buyer satisfaction scores across the entire TMC category.

In actually providing 24-hour emergency services, however, TMCs don't do nearly as well, according to buyers, with a satisfaction score 0.9 points below the importance score, the second-largest such deficit in the TMC category. Travelers, too, weren't overly thrilled with TMC performance in this area, assigning an average score that was among the lowest in the TMC section of the survey.

It's an area that many don't think about until someone actually is in a bind. "When they are stuck on the other side of the world, travelers want that person on the other end of the phone to know who they are, and really care whether or not they get home," according to one travel buyer speaking during The BTN Group's Innovate conference in September.

Ironically, the area in which TMCs most noticeably outperformed expectations was for an element not related to business travel: arranging employees' leisure travel. Perhaps that's because both buyers and travelers on average placed that attribute at the bottom of the list in terms of importance (with the average buyer level of importance particularly low, at 2.78).

THE BOTTOM LINE

When looking at whether TMCs provide high-quality service to travelers, buyers on average assigned an importance score, interestingly, well above the aggregate

Travelers Who Would Recommend Primary Business Travel Agency To Another Business Traveler



Source: A BTN July-October survey of 250 frequent business travelers

score from travelers. Buyers also were, on average, more satisfied than travelers with that service. When assessing the importance of TMCs providing "good overall value for the price," the average buyer ranking was 5.55, versus an average performance score in that area of 4.72.

TMCs make a habit of trumpeting their client retention rates, but when such rates

continue to redefine ourselves and our niche in the market."

According to general travel buyer sentiments, TMCs can maintain and extend their value by becoming strategic partners that can provide meaningful consultation as travel management practices evolve.

OTHER RECENT RESEARCH

The Global Business Travel Association in partnership with Carlson Wagonlit Travel also recently issued results of a travel manager survey on satisfaction with TMCs. Of the roughly 200 North American travel managers polled in May and June of this year, 43 percent indicated they were satisfied with their primary TMC and another 30 percent indicated they were very satisfied. One in 10 were either dissatisfied or very dissatisfied.

"The key driver that contributes the most to satisfaction with services is composed of call center services and traveler satisfaction measurement," according to the GBTA/CWT survey.

Asked about specific types of services, respondents rated TMCs highest for their "ability to work with preferred providers," with 80 percent of North American re-

When looking at whether TMCs provide high-quality service to travelers, buyers on average assigned an importance score, interestingly, well above the aggregate score from travelers.

routinely are 95 percent or above for all TMCs who self-report such figures, it's hard to know what they mean. But *BTN's* survey provides some corroboration: 90 percent of traveler respondents said they would recommend their primary agency to another business traveler. That's a higher percentage than for any other supplier segment covered by this report.

"A long time ago many said travel management companies were going to go away," said Atlas Travel & Technology Group COO Lea Cahill, also speaking at The Beat Live. "Yet here we are, and we

spondents indicated they were satisfied or very satisfied. That was followed by "traveler services" (73 percent) and program management (69 percent). Lowest on that list was "global services," for which 49 percent of respondents were satisfied or very satisfied. "Innovation" also came in toward the bottom (54 percent).

Researchers also found that 71 percent of surveyed travel managers were satisfied or very satisfied with the accountability of account managers, and 69 percent said as much regarding a single point of contact provided for issue resolution.

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Buyers, Travelers Place Top Value On Basic Airline Services



BY MICHAEL B. BAKER

EVEN AS AIRLINES improve on-board technology and premium-class services, corporate travel buyers and business travelers alike still place the most value on the basics.

Both buyers and travelers rated on-time performance as the most important service aspect that airlines deliver. Both groups also gave relatively positive scores to airlines for their performance in that metric.

“That really is the key, especially for business travel, because things are scheduled so tightly,” said Christopher Anderson, who takes at least six roundtrip flights per month as part of his work in clinical research. “It’s been getting a little

bit worse lately. I’ve had a higher percentage of mishaps, not being on time, in the past eight months than I’m used to, though I realize some things are out of their control.”

U.S. Department of Transportation statistics bear out his observations. Year-to-date as of August, the department’s Bureau of Transportation Statistics reported 74.8 percent of flights on U.S. airlines as “on time”—no later than 15 minutes past the scheduled arrival time—down 2.7 percentage points from the same period in 2013 and the lowest level for the comparable time period since 2008. The rate of canceled flights for that period was 2.7 percent, up 1.1 percentage points from the prior year

and the highest level since 2001.

Vicious winter weather in the first part of this year is in part to blame for that bump in delays and cancellations. Chicago’s O’Hare International Airport has had a particularly rough year, ranking dead last among major U.S. airports in on-time performance so far in 2014. Through August, 65.9 percent of arrivals at O’Hare were on time, down 5.7 percentage points compared with the year prior, according to DOT.

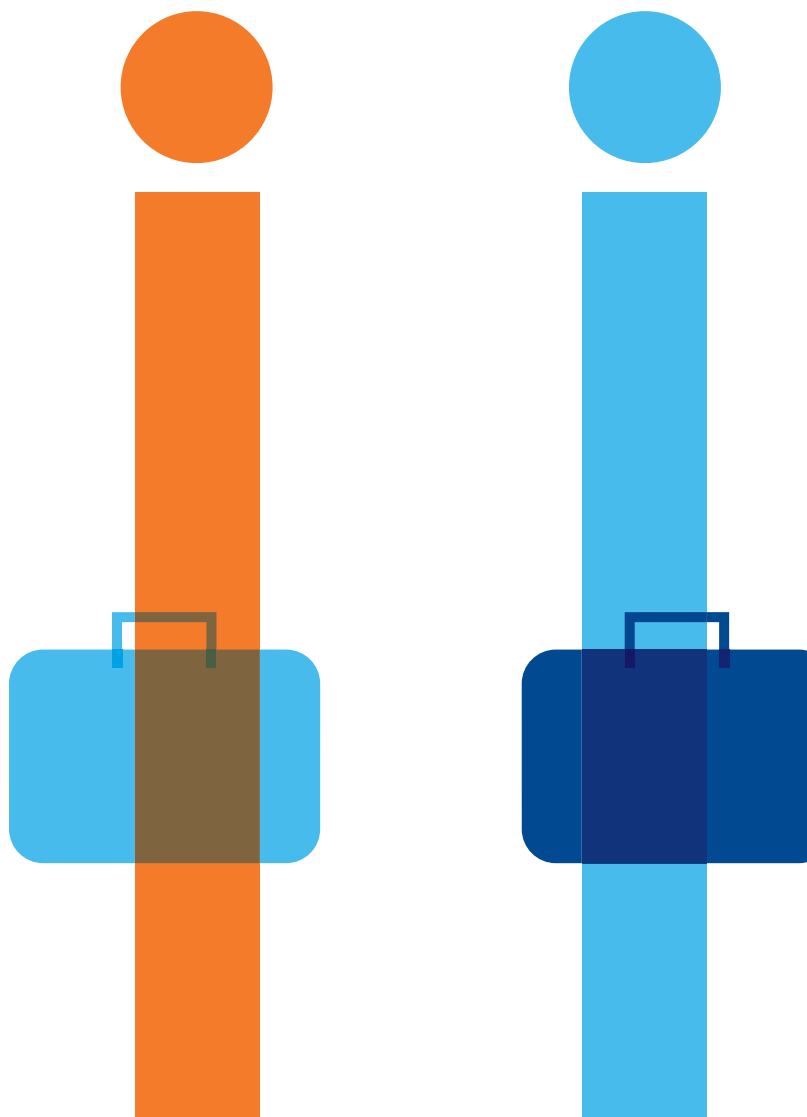
Among major U.S. carriers, Delta Air Lines has had the best on-time performance year-to-date through August, with 82 percent of flights reported on time, according to DOT. US Airways, which

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CONTINUED FROM PAGE 14

still reports data separately following its merger with American Airlines, is second at 79.5 percent, followed by American and United Airlines, each at 75.1 percent, according to the department.

Southwest Airlines trailed other major carriers with an on-time performance of 71.1 percent through August. The airline's vice president of technology of product solutions, Joe Migis, noted improving on-time performance is one of its top priorities.

"We've already started to see some improvement in September, and we want to continue that from this year into next year," Migis said.

For corporate travel buyers, good overall value for the price and desired flight schedules closely followed on-time performance in terms of service quality importance. While buyers scored airlines relatively well for flight schedules, they showed much lower satisfaction levels with the overall value, giving it the third-lowest rating of any metric for airlines.

Kim Kaye, global director of travel, expense and policy for Keysight Technologies, noted that value and on-time performance are linked.

"So often, they're all fairly similar as to what the price point is," Kaye said. "We're looking for components like whether they will get the travelers there on time so they can be more productive in their jobs."

Airlines, meanwhile, are looking for other ways to show differentiating value as related to cost. Delta, for example, recently has reintroduced its basic economy fares, which offer the lowest fares for those travelers willing to waive such privileges as advance seat assignments or complimentary upgrades.

"When we compete against Spirit or other ultra-low-cost carriers, we always want to have the best product competing against that," Glen Hauenstein, Delta's executive vice president of network planning and revenue management, said this month during the company's third-quarter earnings call. "[With] the

Importance Of Airline Services And Satisfaction With Primary Airline Performance

Rated on a scale of one to six, with one meaning "not at all important" and "falls short of expectations," and six meaning "extremely important" and "exceeds expectations"

Buyers

	Importance	Satisfaction With Primary Supplier
Gets travelers to destinations on time	5.74	4.41
Provides good overall value for the price	5.56	4.08
Provides desired flight schedule	5.55	4.45
Delivers baggage without delays	5.54	4.53
Resolves customer service complaints	5.48	4.12
Has comfortable seats	5.37	3.90
Has professional flight crew	5.36	4.73
Has modern fleet	5.30	4.60
Has onboard laptop power	4.94	3.93
Has inflight Internet access	4.91	4.40
Offers upgrades	4.65	4.22
Provides premium-class service	4.44	4.55
Provides lounge access	4.01	4.32

Travelers

	Importance	Satisfaction With Primary Supplier
Gets traveler to destinations on time	5.18	4.62
Delivers baggage without delays	4.99	4.57
Has comfortable seats	4.95	4.43
Has professional flight crew	4.90	4.54
Has adequate leg room	4.88	4.37
Has onboard laptop power	4.72	4.53
Has modern fleet	4.66	4.59
Has multiple frequent-flyer partners	4.65	4.59
Has inflight Internet access	4.57	4.59
Provides premium-class service	4.52	4.68

Source: A BTN June-October survey of 146 travel managers and 367 frequent business travelers

products that we're introducing in basic economy, you get the reliability of Delta and you get all the operational excellence of Delta, but you don't get some of the amenities that you don't need."

More direct to the travel buyer's perspective, a Delta spokesperson also pointed to the carrier's "Edge" program, launched for corporate clients earlier this year. Among the program's features are a corporate portal through which buyers can access Sky Partner reports with cli-

ent-specific performance metrics and a points-based system through which corporate clients can manage name changes, fee waivers and preferred seating.

The value proposition would be even better realized, Kaye said, were buyers able to "from a negotiation standpoint, have the capability to look at total cost—not just the airfare, but all ancillaries." Doing so has remained elusive for many buyers, though a few have made prog-

CONTINUED ON PAGE 18

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ress. Oracle, for example, has been able to get certain ancillary fees, including checked-bag and upgrade fees, to count toward its contracts whenever there was a spending shortfall.

Buyers and travelers both rated efficient baggage handling as highly important; for travelers, it was the second-most-important service quality of all. Both also gave relatively high satisfaction marks to carriers for baggage handling.

Rob Cordell, a frequent traveler as an executive director and counsel at a securities firm, said that while he tries to avoid checking luggage whenever possible, “nothing makes me crazier than to wait a long time if I have to check a bag or take a document box.” He added that performance by his preferred airline has “been adequate, though every once in a while there’s a blip and you wait longer than expected.”

DOT statistics, meanwhile, show that mishandled luggage reports at U.S. airlines in August were up year over year to 3.69 reports per 1,000 passengers, compared with 3.12 reports in August 2013. Mishandled luggage reports also were up year over year at American, Delta and United, though Delta (2.45 reports) and United (3.32 reports) each fared better than average.

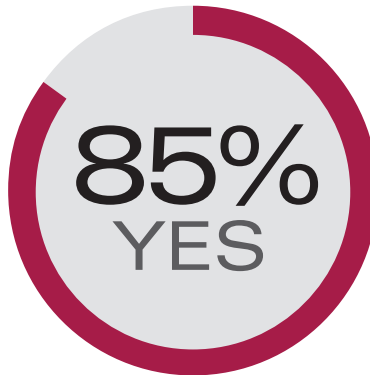
Virgin America (1.06 reports), Frontier Airlines (1.87 reports), Hawaiian Airlines (2.18 reports) and JetBlue Airways (2.32 reports) had the best baggage records for the month.

Overall in the survey, airlines received the lowest satisfaction marks from both buyers and travelers in the comfort criteria. Buyers gave airlines the lowest score for comfortable seats; travelers gave the lowest marks for adequate legroom, followed by comfortable seats.

As many airlines have added capacity without adding fleet—which in part has involved adding more economy seats to existing planes—some travelers have taken notice.

“It’s definitely gotten worse, where it seems like they’re trying to cram

Travelers Who Would Recommend Primary Airline To Another Business Traveler



Source: A BTN July-October survey of 367 frequent business travelers

more seats in,” Anderson said. “I try to get the exit row when I can, but I have been on planes where it’s been painfully uncomfortable.”

Cordell concurred, noting that he depended on frequent-flyer status for either upgrades or premium-economy seating and even would eschew the option of fly-

senior vice president of worldwide sales Dave Hilfman.

Both buyers and travelers gave the highest overall satisfaction scores in the airline category to premium-class services. However, they also were rated lowest in terms of importance for travelers and second-lowest for buyers, with only lounge access rating as less important.

Airlines also have stepped up efforts to provide inflight Internet access. United plans by the end of next year to have Wi-Fi throughout its mainline fleet and larger, two-class regional jets, Hilfman said, and Delta in 2012 installed the service on 590 domestic mainline aircraft and completed installation on regional jets. Inflight Wi-Fi ranked low in terms of importance to both buyers and travelers, though both groups gave the service relatively high satisfaction marks. In-seat power was rated slightly more important by both groups.

BTN surveys in recent years have shown initial reticence from corporations in reimbursing for inflight Wi-Fi, and for some business travelers, it’s not an essential component of productivity.

Overall, airlines received the lowest satisfaction marks from both buyers and travelers in the comfort criteria. Buyers gave airlines the lowest score for comfortable seats; travelers gave the lowest marks for adequate legroom.

ing standby on earlier flights as it would likely mean being stuck in a tighter seat.

At the same time, airlines have been boosting comfort in premium cabins. Delta, for example, has installed full flatbed seats with direct-aisle access on all widebody overseas flights. United, similarly, has put flatbed seats on all long-haul international flights from the continental United States, according to

“I’m probably just too old, but I’m past the mark where I feel like I want to be connected at all times,” Cordell said. “I need to turn it off for that period, and if I have something I want to review, I’ll take a physical printed document.”

Even so, the Delta spokesperson said the carrier’s internal feedback had indicated that “people are choosing Delta based on Wi-Fi availability.”

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Gearing up for the big day, Southwest commandeered 16 gates in Love Field's new 20-gate terminal and has been flying solely from its modernized operations hub since August. With all the pieces in place, business travelers on Southwest will have access to more business markets than ever.

STRATEGIC PARTNERSHIPS

Southwest is renowned for its no-change-fee policy and free checked baggage*, but there's more to gain from a formal corporate partnership. Corporate travel professionals count on Southwest Airlines to create strong strategic agreements and deliver an enhanced loyalty program and premium options for business travelers—alongside the reliable products that have made the carrier a favorite for all types of travelers.

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Chicago Midway	6	Orlando	3
Denver	3	Phoenix	4
Fort Lauderdale	2	San Diego	2
Las Vegas	4	Santa Ana/Orange County, CA	1
Los Angeles	4	Tampa Bay	2
		Washington Reagan	6



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*** For more on green initiatives, see the Southwest One Report: <http://www.southwestonereport.com/2013/>

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Respondents: Cleanliness Next To Godliness, So Is Free Internet



BY STACEY J. ROSENFELD

TRAVEL BUYERS AND business traveler respondents both ranked clean and comfortable rooms, complimentary Wi-Fi, efficient workspaces and polite staff among the most important hotel services and the ones with which they are most satisfied with respect to their primary full-service hotel suppliers, according to *BTN's* Traveler Service Quality survey.

The cleanliness and comfort of rooms ranked as most important among both buyers and travelers, respectively assigning the category a 5.81 and 5.10 in importance on an ascending scale of one to six, with one being “not at all important” and six symbolizing “extremely important.” Buyers indicated a satisfaction level of

4.98 in this area, while travelers nearly matched that level, assigning a 4.80 for clean, comfortable rooms.

Both buyers and travelers placed free Internet access in the second-most-important spot, with buyers rating this attribute a 5.62 in importance and travelers rating it a 5.08. Travelers reported greater satisfaction in this area (4.81) than did their buyer counterparts (4.41).

A professional and polite staff ranked third in importance to buyers with a score of 5.55, while this area was fourth in importance to travelers with a flat 5. The groups, however, indicated slightly different levels of satisfaction with their primary suppliers in this area, with scores of 4.94 and 4.71, respectively.

In-room workspaces, including light-

ing, desk and chair, ranked highly among buyers and travelers, though travel managers assigned a 5.31 level of importance and travelers rated their importance at a 5.02. Notably, the level of satisfaction was nearly identical in this category, with buyers assigning a score of 4.73 and travelers a 4.76.

The survey revealed some priority discrepancies between buyers and travelers, as the importance of free parking placed fifth for travelers but registered in tenth place among buyers. Additionally, the importance of an early check-in option is noticeably lower for travelers than it is for buyers. Both groups agreed, however, on what was less important to them: specifically, a mini-bar, club floor

CONTINUED ON PAGE 22



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CONTINUED FROM PAGE 20

and 24-hour room service. Buyers and travelers placed these areas in the three least-important spots.

Hotel companies are developing new methods of assessing the service preferences of their customers and delivering to them what they want, said Shannon Garcia, vice president and principal of BCD Travel consulting arm Advito. “Hotels have long-established guest loyalty programs and systems to track travelers’ preferences and habits. This data is mined for targeted marketing and saved in the travelers’ stay records for ongoing communication and targeted promotions after the stay. This is not a new capability, but the depth of the data they collect and use is more sophisticated than ever before.”

Added Advito hotel practice leader Marwan Batrouni: “As for identifying what’s important to travel buyers, large chains and key hotels in a client’s program typically meet with buyers on a quarterly (or even monthly) basis to ensure broad client needs and requests are taken into consideration. Hotel representatives take the feedback away and work with their corporate owners or management groups in order to implement these requests where possible.”

Garcia noted that the focus of hotel initiatives and programs designed to enhance satisfaction has shifted.

“For a long time, the focus was on procurement and sourcing, but the subject of the traveler experience was not really at the forefront. This is rapidly changing,” she said.

As for where the consultants are seeing the hotels invest their money, Batrouni said, “This really varies by hotel market tier and service level. The majority of chains are investing back into their brands and properties through renovations of their lobbies, rooms and other facilities.

“A comfortable, clean and safe experience is paramount for every guest,” he continued. “Internet access is extremely important to all business travelers, so

Importance Of Hotel Services And Satisfaction With Primary Full-Service Hotel Performance

Rated on a scale of one to six, with one meaning “not at all important” and “falls short of expectations,” and six meaning “extremely important” and “exceeds expectations”

Buyers

	Importance	Satisfaction With Primary Supplier
Has clean, comfortable rooms	5.82	4.98
Has free Internet access	5.62	4.41
Has professional/polite staff	5.55	4.94
Has proper lighting, desk and chair for working	5.31	4.73
Has evident security personnel	4.95	4.55
Has fitness facilities	4.87	4.56
Offers early check-in	4.84	4.19
Has self check-out	4.80	4.64
Offers late check-out	4.77	4.36
Has free parking	4.63	4.06
Has onsite business center services	4.60	4.73
Has airport pickup	4.32	4.29
Has self check-in	4.03	4.14
Has 24-hour room service	3.91	4.25
Has club floor	3.79	4.37
Has mini-bar	2.57	4.17

Travelers

	Importance	Satisfaction With Primary Supplier
Has clean, comfortable rooms	5.10	4.80
Has free Internet access	5.08	4.81
Has proper lighting, desk and chair for working	5.02	4.76
Has professional/polite staff	5.00	4.71
Has free parking	4.86	4.70
Has evident security personnel	4.73	4.63
Offers late check-out	4.70	4.60
Offers early check-in	4.69	4.60
Has onsite business center services	4.67	4.78
Has self check-out	4.58	4.63
Has fitness facilities	4.52	4.69
Has airport pickup	4.50	4.61
Has self check-in	4.37	4.61
Has club floor	4.30	4.57
Has 24-hour room service	4.08	4.38
Has mini-bar	3.86	4.36

Source: A BTN July-October survey of 127 travel managers and 368 frequent business travelers

you will find more chains are investing in a wireless infrastructure allowing guests to be able to have high-quality access in all areas of the hotel using their multiple devices.”

Many chains also are focusing on how they can make their guest loyalty programs even more rewarding by enhancing their benefits and high-touch service, especially for their elite-status guests, Batrouni noted.

Robert Radomski, vice president of brand management for InterContinental Hotels Group's Staybridge Suites and Candlewood Suites brands, equated customer satisfaction with the company's goal of “making the business traveler's experience home-like while on the road,” pointing to such amenities as fully equipped in-suite kitchens and free high-speed wireless Internet.

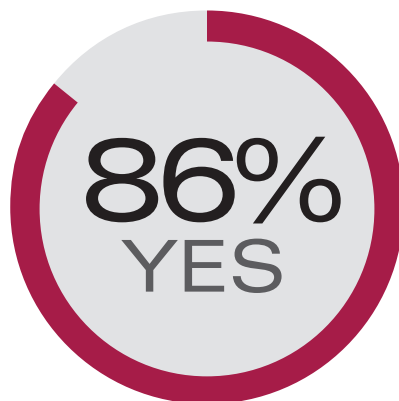
Candlewood also recently launched the Lending Locker, a place within the hotel where guests can borrow common household items to use during their stay, and the Candlewood Cupboard, an in-hotel convenience store, open 24 hours daily. Radomski also referred to Staybridge Suites' complimentary evening reception, which he said “fosters a sense of community within the hotel,” what he called a priority for the brand's typical guest.

CHAIN SURVEY SHOWS SERVICE BOOST

BTN earlier this month published this year's version of its Hotel Chain Survey, an annual assessment by business travel buyers of the performance of individual hotel brands in areas including, but not limited to, service-related aspects like public and in-room business amenities, personal amenities, the physical appearance of the properties, consistency of offering and helpful and courteous staffers. Brands by and large performed well in the 2014 Hotel Chain Survey, with buyer ratings generally higher than they were in 2013.

Those results reflect the capital improvement investments many chains

Travelers Who Would Recommend Primary Hotel To Another Business Traveler



Source: A *BTN* July-October survey of 368 frequent business travelers

are making in their products. Scores for Marriott International's flagship brand, for example, topped the overall upper-upscale tier. The chain in recent years has debuted service initiatives like its “great room” lobby concept and its Red Coat Direct App, which lets meeting planners make simple onsite requests for service.

Many chains also are focusing on how they can make their guest loyalty programs even more rewarding by enhancing their benefits and high-touch service, especially for their elite-status guests, Advito hotel practice leader Marwan Batrouni noted.

“We are on a journey to make travel better, be it through mobile initiatives, service initiatives or product-improvement initiatives,” said Marriott senior vice president of brand management Paul Cahill. “It's what we've always done as a company, but now, we are doing it faster.”

Scores for Marriott's Courtyard brand, meanwhile, topped the *BTN* 2014 Hotel Chain Survey's upscale tier. The brand

recently developed a new guest-room décor which now appears in more than 50 Courtyard properties, designed to accommodate younger travelers.

“Through consumer research, we learned that Gen-X and Gen-Y travelers are getting their work done in different ways, and they're not necessarily looking to check in and go right to their room to work,” said Janis Milham, Marriott senior vice president of modern essentials and extended-stay brands. “The first signal in the room is about relaxation, when it used to be all about work. We also have a lot of plug-ins: electrical outlets and USB ports.”

Upscale chain Doubletree, which finished second in its tier in *BTN*'s earlier survey, has focused on service and product quality and is making quality-assurance visits to help ensure standards are met, said Doubletree global head John Greenleaf.

Group business is a critical part of Doubletree's mix, and just this month the brand begins to test a new online booking tool for small events, Greenleaf said. Without requiring a request for proposal, the technology lets planners arrange and

book meetings online with their credit cards, he said.

“With many more small meetings being held in hotels, many of those have been booked in the way big meetings have in the past,” Greenleaf said. “This is a way to streamline it, so the sales force can still ensure a good experience but guests have added flexibility.”

Michael B. Baker contributed to this report.

Value For Rental Car Price Tops Travel Managers' List Of Importance



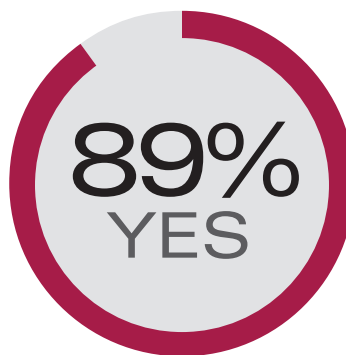
BY JoANN DeLUNA

WHILE CAR RENTAL companies continue to invest in their technologies by introducing new mobile functionality, expanding use of global positioning systems and smoothing the arrival and departure experience through upgraded kiosks, what's most important to travel manager respondents as far as car rental services go is "good overall value for the price," according to the *BTN* survey.

Travel managers rated price value 5.63 on an ascending importance scale of one to six, with one being "not at all important" and six symbolizing "extremely important." Expedited car return and preferred check-in status ranked next in importance among buyers, with ratings of 5.52 and 5.45, respectively.

Engineering and design firm Arcadis senior vice president John Moriniere said price and reliability are at the top of his list of important factors to consider when choosing a car rental company, as well as

Travelers Who Would Recommend Primary Car Rental Company To Another Business Traveler



Source: A BTN July-October survey of 257 business travelers

the presence of a good geographic network, because the global engineering firm needs rental cars throughout the United States. Arcadis doesn't have a travel department, but Moriniere is responsible for

making travel supplier recommendations.

"Cost is not the most important element because you want quality cars that are reliable," Moriniere said.

As Arcadis prepares to develop a global car rental program, having global capability also will be important for the firm, which is based in Amsterdam, Moriniere added. National Car Rental is Arcadis' primary car rental supplier, and Moriniere said he rates it for overall service as a five on an ascending one-to-six scale. "Every once in a while there are some issues ... but the quality of the cars is very high and the staff is very good," he said.

Universal Music Group vice president and global head of travel Pamela Witherspoon said her company's business is "much different" than that of a typical corporate account, as 60 percent of its travel and transactions are for "non-employees" including artists, entourage members, contest winners or security officers.

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CONTINUED FROM PAGE 24

check-in and checkout, Universal requires other such services as high-end rentals; full insurance coverage with rates, including vandalism and insurance on exotic cars; direct billing for non-employee rentals; delivery and pickup of cars when needed; a rental location that tracks vehicles that are past due on return dates; acceptance of split payment if the renter decides to upgrade or add features that are outside company policy; “and in sold-out situations, a rental car rep that can ‘get it done,’” she explained through email.

“Buyers now are focusing on total costs of rental when they’re doing their sourcing, rather than negotiating on the rate components,” said Doyle Gunnell, global project manager for the Carlson Wagonlit Travel Solutions Group. “They’re looking to cut controllable ancillary costs that drive the overall price.”

Keysight Technologies global director of travel and expense Kim Kaye said she looks to avoid surcharges like one-way or drop-off fees. She also tries to secure value add-ons like unlimited mileage or complimentary upgrades for loyalty program members.

For surveyed travelers, having professional, polite staff was the most important factor among those offered, indicated by a 5.03 average rating, followed by 24-hour roadside assistance (5.00) and expedited car return services (4.90). Roadside assistance was less important for buyers, ranking fourth, which may be indicative of the relative infrequency with which such services are required. “It’s very important, but I haven’t heard of anyone that has used the service,” said Arcadis’ Moriniere.

Likewise, “over 90 percent of emergency road service calls are locked keys in the car, a relatively minor incident that doesn’t put the traveler at risk,” said CWT’s Gunnell.

The availability of in-car directions using global positioning devices was rated lowest and second-to-lowest in importance respectively by travelers and buyers. With the emergence of smartphones, Gunnell said the service presumably is becoming obsolete. While there has been

Importance Of Rental Car Services And Satisfaction With Primary Rental Car Supplier Performance

Rated on a scale of one to six, with one meaning “not at all important” and “falls short of expectations;” and six meaning “extremely important” and “exceeds expectations”

Buyers

	Importance	Satisfaction With Primary Supplier
Provides good overall value for the price	5.63	4.65
Has expedited car return	5.52	4.82
Provides preferred check-in status	5.45	4.98
Offers 24-hour roadside assistance	5.34	4.54
Has professional/polite staff	5.31	4.75
Availability of cars in multiple price ranges	5.17	4.59
Provides upgrades	4.63	4.53
Offers express toll devices	4.52	4.22
Offers in-car directions using global positioning devices	4.39	4.41
Offers cars not easily identified as rentals	4.27	4.46

Travelers

	Importance	Satisfaction With Primary Supplier
Has professional/polite staff	5.03	4.91
Offers 24-hour roadside assistance	5.00	4.78
Has expedited car return	4.90	4.84
Availability of cars in multiple price ranges	4.85	4.77
Provides preferred check-in status	4.85	4.73
Provides upgrades	4.80	4.70
Offers express toll devices	4.66	4.55
Offers cars not easily identified as rentals	4.62	4.62
Offers in-car directions using global positioning devices	4.60	4.65


Source: A BTN July–October survey of 257 business travelers and 121 business travel buyers and managers

a decline in demand, some companies still look for GPS, especially for foreign travelers, he said. “When car companies have that diversity of clients, the companies have to maintain robust product offerings to meet all the different needs of all those types of travelers,” Gunnell said.

Hertz Corp. in September announced a partnership with Navigation Solutions to launch a newer version of its NeverLost GPS system and in 2013 announced plans to have tablets installed with the NeverLost GPS system inside vehicles.

Meanwhile, Avis Rent a Car System and Budget Rent a Car in March launched

new mobile apps providing corporate travelers with access to ancillary products including GPS device rentals, fuel service and various forms of insurance.

Car companies also are investing in other technologies that improve the traveler experience. Hertz has 24-hour Express-Rent kiosks that allow clients to speak directly with customer-service representatives. Avis and Budget in June rolled out portable Wi-Fi devices in 12 European countries that offer clients one gigabyte of data per day for up to five devices. Avis in 2013 was the first rental car company to integrate with Google Wallet. 

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