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BUSINESS TRAVEL NEWS

July 31, 2023



SMALLER SPENDERS, BIGGER DEAL

Small and midsize business travel programs—
both managed and unmanaged—are being seen in a new light

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EDITOR'S LETTER

Small & Midsize Programs Come Into Their Own

Unmanaged, lightly managed, newly managed ... even if you think your small and midsize travel program is mature and there's nothing more you can squeeze from your suppliers, it may be time to think again.

The entire business travel industry seems to be trying to fit itself into a smaller box, or at least have a tidy product that will allow them to do so part of the time. The industry has witnessed the continued resiliency of the small and midsize enterprise, and so many suppliers seem to have pinned their hopes on capturing that small- to midsize segment of as part of the new travel management opportunity set.

But as BCD Travel's Drew Mitchell rightly points out in contributing editor Lauren Arena's report that starts on page 5, those buyers and programs aren't always so easy to reach and convert to into clients, even if they would be willing to be one!

Especially in smaller programs, the travel management function may be couched inside of a job role that has little to do with travel. In this issue, we spoke to Lisa Litt, the executive assistant to the CEO of Palmetto Infusion on page 5, who manages the company's travel as part of her role at the growing company.

We also spoke with VP of sales for Hyde Tools Bob Clemence, who is clearly one of the company's road warriors, but also takes responsibility for keeping track of travel policy and

likely enforcing it for his traveling team members. There are just 10 traveling employees at Hyde, but they are keeping the lights on at Hyde Tools and beating their competitors.

These are the kinds of go-getters that often run SME travel programs. They want quick, practical and intuitive solutions for their travelers, but also ones that are nuanced for their business, their corporate culture and strategic goals.

SME programs are not a one-size-fits-all phenomenon. Buyers in this issue couldn't be more diverse in their travel strategies. If you are one of these SME buyers looking for business travel support, you can find it at Business Travel News. I hope you'll read this issue and pass it along to another smart travel buyer, no matter what formal job title they may hold.



Enjoy the issue,

Elizabeth West

Editorial Director, BTN Group

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Avis Budget Group is proud to sponsor this special issue of Business Travel News once again. It offers insights and benchmarks that should prove valuable for travel managers who wish to adopt best practices. Thank you for allowing us to serve you. We look forward to the road ahead (with you).

Sincerely,

Beth Kinerk
Senior Vice President, Global Sales
Avis Budget Group



Dear BTN travel industry family,

We’re at a turning point in our industry – where suppliers can offer customized benefits for large corporations, small and medium businesses, and individual travelers alike. More so than ever before, you can make business travel work for you with more perks and benefits at your fingertips. There are a lot of options out there, but taking time to understand what’s available to you can maximize your travel return and become a flying pro.

Loyalty programs are most commonly known for travelers earning rewards. The United MileagePlus® program allows you to earn miles on the travel you’re already doing with us and is a great first step to accruing rewards and earning status. Membership unlocks incentive programs that can accelerate your path to status, give you access to discounts on your leisure travel through Break from Business, and more. Plus, our Corporate Preferred program rewards our best and most loyal business travelers with a full range of premium travel perks.

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I know you have options when it comes to travel, so I am grateful every time you step on board our aircraft. My promise to you is we’ll work to earn your business every flight, every day. Enjoy this Business Travel News Summer Research: Small and Medium Enterprise Business Travel Report.

Sincerely,

Doreen Burse
Senior Vice President Worldwide Sales
United Airlines



FOREFRONT

Suppliers Show New Willingness to Engage

BY LAUREN ARENA

Small and midsize companies were seen as the driving force behind the rebound in post-pandemic travel and, even in the face of higher airfares and hotel rates, this trend looks set to continue into 2024.

Some SMEs like medical unicorn Palmetto Infusion are in high-growth mode, where a wave of new hires has resulted in an increase in travel to training events at its Columbia, S.C., headquarters and to deliver services at some 40 U.S. clinics.

Travel manager and executive assistant to the CEO Lisa Litt said the company has a “light” travel policy with 150 active travelers but no managed program. Given the recent rise in travel, however, she’s now on the hunt for an online booking tool that will help automate manual processes around expense reporting and also offer greater visibility on traveler whereabouts in the case of an emergency.

Non-profit organization Rotary, which continued to travel during the pandemic, has a global program with some 7,000 trips a year—where 80 percent of travelers are volunteers and mostly one-time travelers. Controlling travel spend is key priority for travel services manager Carla DeSanto, who said the organization last year came close to its pre-Covid travel spend of \$7.3 million. Since the pandemic, DeSanto has tightened

duty-of-care policies and is looking to consolidate her TMC affiliates outside of the U.S. to better capture spend data.

Travel management companies also are reporting an increase in interest from SME clients looking to newly implement managed travel programs.

“The SME segment has rebounded very strongly,” said Jean-Christophe Taunay-Bucalo, chief revenue officer at TravelPerk,

Does your company use supplier rate or benefits programs designed for SMEs?

	Airline	Hotel	Car Rental	TMC
Yes	61%	44%	46%	56%
Aware of products, do not use them	15%	18%	17%	13%
Unaware of products, do not use them	11%	22%	22%	15%
Don't know	14%	15%	16%	17%

Source: A BTN June-July survey of 151 small and midsize enterprise travel and procurement managers

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Brightening Skies

SMEs Adopt Sunnier Financial Outlook

BY CHRIS DAVIS

Small and midsize business owners have seen the economic data in the United States that shows inflation has cooled substantially during the past year, and economists who have backed off somewhat their forecasts for recession. And they’re by and large more optimistic than they were, at least about their businesses’ financial prospects, their revenue projections and their prospects of hiring new workers. But generally, they haven’t fully bought in to the prospect of a strong recovery, and recent surveys show they have an improving outlook, but also a cautious one.

“Small business owners want to believe and live in the news of positive stock market performance and lower inflation numbers,” said U.S. Chamber of Commerce vice president of small business policy

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METHODOLOGY
Business Travel News fielded the 2023 Small and Midsize Enterprise survey from June 22 to July 14 on the SurveyMonkey platform. BTN via email solicited responses from subscribers to BTN, BTN Europe and BTN’s newsletters. BTN also solicited responses via the BTN Daily newsletter. A total of 151 qualified respondents answered the survey, 89 percent from North America and 9 percent from Europe. Not every respondent answered every survey question. BTN editors used the SurveyMonkey platform to collect and analyze results. In the charts in this issue, not all figures add up to 100 due to rounding. BTN editors followed up with interviews of travel and meetings executive to help create this 2023 SME special report.



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Thomas Sullivan in a statement on the Chamber’s site. “However, employers on Main Street can’t seem to shake worker shortages, heightened costs of supplies, rising interest rates, and anxiousness over economic uncertainty. That anxiety is making this summer a long, hot, and sticky one.”

As they have done each quarter since 2017, Chamber of Commerce and MetLife in May surveyed about 750 small and midsize business owners about their sense of business conditions and the economy. They found a respondent base with an improving economic outlook, even though fewer than one in four indicated they thought the U.S. economy at that time was good. About 71 percent of respondents, a record in the survey, expect their businesses’ revenue to increase in the next year. A record 47 percent said they expect to hire more staff in the next year, too.

“Employers on Main Street can’t seem to shake worker shortages, heightened costs of supplies, rising interest rates and anxiousness over economic uncertainty. That anxiety is making this summer a long, hot and sticky one.”

— U.S. CHAMBER OF COMMERCE’S THOMAS SULLIVAN

Increasing revenue and staff are the types of conditions that traditionally have generated increased business travel. Whether that happens remains to be seen, but it’s fair to say that the SME executives’ outlooks don’t suggest any widespread travel cutbacks are on the horizon, either.

“The challenges of our current economy may have delayed some small business owners’ plans to expand or hire more staff, but now they see opportunity for growth on the horizon,” Sullivan said in a statement accompanying the survey. “Small businesses are again showing remarkable resiliency.”

Since that survey, the U.S. Bureau of Labor Statistics released the Consumer Price Index which showed annual U.S. inflation had increased to 3 percent in June, down markedly from 9.1 percent one year earlier, and Goldman Sachs reduced its forecast likelihood of a U.S. recession to 20 percent from 25 percent.

The National Federation of Independent Business conducts monthly surveys of its small-business members’ outlooks, and its most recent results show a respondent base beginning to emerge from deep economic pessimism. While the net percent of those respondents who think the economy will be worse in the next six months is 40 points more than those who think it will be better—NFIB didn’t release precise figures—that’s down from 50 points in May. And its “Small Business Optimism Index,” a collective metric designed to measure sentiment over time, increased 1.6 points in June to 91, though far below the 49-year average of 98.

While the NFIB characterized their members’ outlook on business prospects and sales as “very pessimistic,” it still noted that “in some industries, such as construction, health care, transportation and some consumer ser-

vices, spending and therefore labor demand remains strong.”

Still, SMEs on the whole in 2023 have not aggressively spent on general expenditures. According to American Express, overall corporate spending, which includes travel and entertainment expenditures as well as goods and services, among U.S. SMEs increased 2 percent year over year.

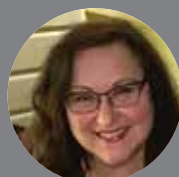
Amex chairman and CEO Stephen Squeri in July during the company’s second-quarter earnings call cited tentative organic growth among SMEs as a culprit for the sluggish spending growth, calling it an “an industry-wide slowdown,” not specific to Amex.

“The biggest thing there from a small business perspective is really the organic growth. I think organic growth has slowed,” Squeri said. “And I think small businesses grew very, very rapidly. And I think they have slowed down.” ■

THIS
ISSUE’S
BUYERS



Palmetto Infusion
Travel Manager &
Exec. Assistant to
the CEO
Lisa Litt
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Rotary Club
International
Travel Services
Manager
Carla DeSanto
page 5



Globus Medical
Group Travel
Manager
Brianna Lazzaro
page 18



ScanSource
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Bob Clemence
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THIS IS THE STORY
OF AN AIRLINE WHEN
**GOOD
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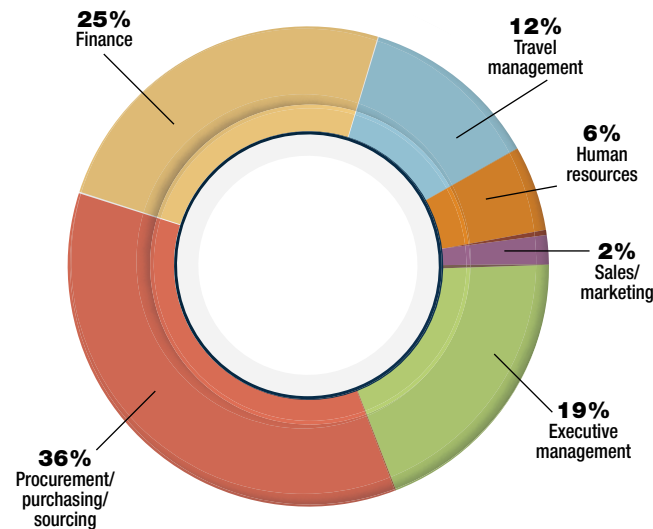
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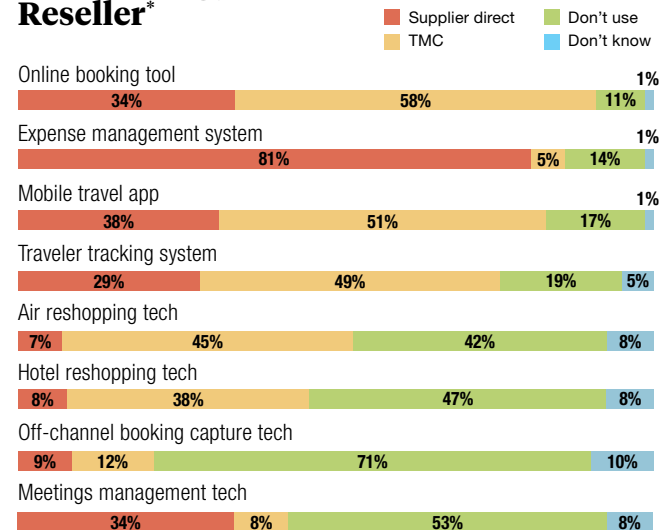
Today's Small & Midsize Travel Programs

BTN in June and July surveyed more than 150 small and midsize enterprises to better understand their travel management structures, philosophies and priorities. Details from the survey can be found throughout this issue, and below are some figures concerning respondents' organizational approach to travel and technology.

Where the Travel Function Reports in the Organization

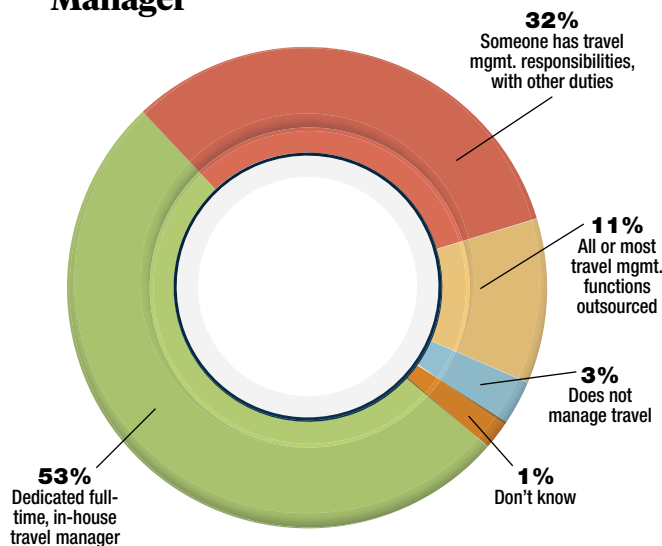


Tech Strategy: Supplier Direct or TMC Reseller*

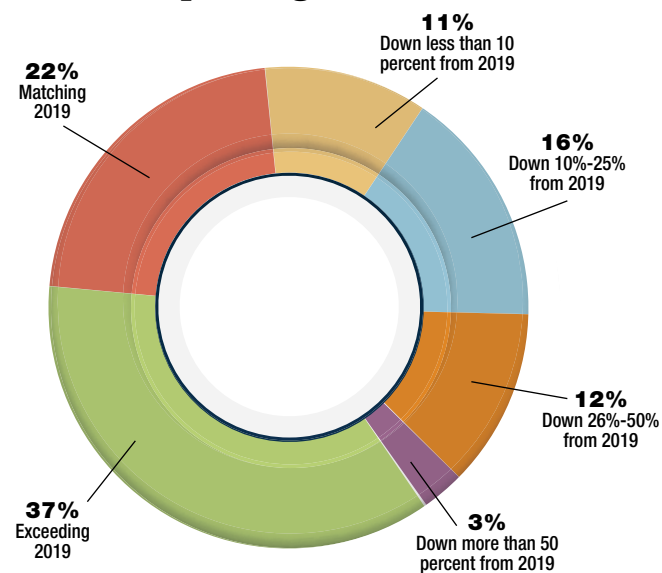


* Bar graphs may exceed 100% due to rounding
** Some respondents use both supplier direct and TMC, total exceeds 100%

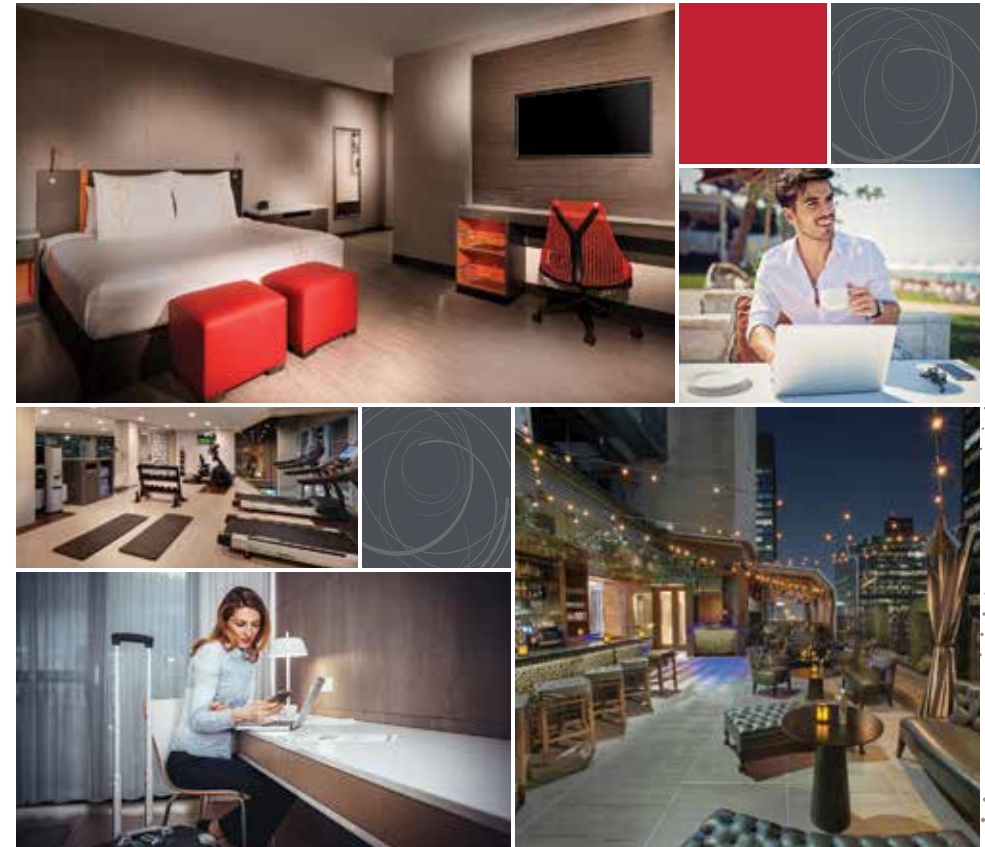
To Be, Or Not to Be, a Dedicated Travel Manager



SME Travel Spending: 2023 v. 2019



Adds to more than 100% due to rounding



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Suppliers Show a New Willingness to Engage

which has about 70 percent of its business in this segment. “It is likely at the same or above 2019 levels by now, though there are some slight variations depending on industries and geographies.”

The Barcelona-based travel management platform entered the U.S. in 2021 and it is now its largest market for new business acquisition. “We have more than 70 people working in the U.S. market,” said Taunay-Bucalo. “We have developed strong ties with expense partners within this market as well as key inventory partners, and we intend to continue doing so.”

The company has also been “investing heavily in AI” to “enhance the traveler experience” and automate post-booking processes such as modification and cancellation, according to Taunay-Bucalo. “The SME market has always been the largest in volume so there’s a lot of opportunity,” he said.

Gant Travel Management, which specializes in small and midsize corporate travel, has also seen new client acquisition return to pre-pandemic levels.

Gant president and CEO Patrick Linnihan said companies with a high sales or high service focus are traveling more and looking to rein in costs while making productivity gains and driving down risk during travel.

“There’s an awareness of the increasing cost [of travel] and an awareness of the question, ‘How can we do this better?’” Linnihan said of the mindset of new clients. “We’re also starting to see duty of care matter inside the SME segment [in a way] that we didn’t see before.”

Along with SME business growth, Linnihan attributed the increased need for managed travel among this segment to a series of industry disruptions—from the talent crunch on the supplier side, to changes in distribution and a new wave of Millennial business travelers.

“The chaos of the ecosystem is such now that [SMEs] are asking for help,” he said. And competition to come to their aid is heating up. “We’re trying to beat each other by being able to identify who needs travel and how we deliver exactly what they want,” Linnihan explained.

Gant already has tools to support ‘light’ travel management. This includes its proprietary booking tool, Tripcircuit, which now wraps in New Distribution Capability content from American and United airlines, a step toward delivering on that traveler experience.

“We see now more than ever that [suppliers] are doing everything they can to earn the trust [of travelers] and attract the traveler directly to their network.”

Indeed, hotels and airlines are taking note of the power—and resilience—of the segment. So, what does this mean for SME travel buyers? Better bargaining power, for one thing.

“If you’re in [the SME] space, this is probably the best time ever for you because everybody—car rental, airlines, hotels—has all woken up to how big this space is and the need to have a program.”

— MARRIOTT INTERNATIONAL’S TAMMY ROUTH

“If you’re in [the SME] space, this is probably the best time ever for you because everybody—car rental, airlines, hotels—has all woken up to how big this space is and the need to have a program,” said Tammy Routh, SVP global sales for Marriott International.

During a recent BTN webinar, Routh said the group is “still figuring out” its 2024 pricing but is keen to “lean deeper into partnerships and business relationships” to offer better value—this includes a dedicated program for SMEs.

“We are a little bit behind,” Routh admitted. “But we will have a program in the future that will make it very easy to do business with us. So, that is our greatest desire, to get this launched.”

In the meantime, she advised SME travel buyers to negotiate directly with hotels at the local level for top markets and then “ride” the Bonvoy program for all secondary markets “because if someone’s a member they’re going to get a discount,” she said.

Accor came to the table last January with its ‘Business Offer Auto-Enroll’ offer, which provides discounts of up to 9 percent as well as a “seamless” booking experience. The service also provides an automated contract process enabling customers to enroll after answering a few questions online.

Airlines also are revamping programs to better serve SMEs, with a focus on simplicity and flexibility. Lufthansa Group this summer updated its PartnerPlus-Benefit program, which includes United Airlines.

Updates include a “more transparent” way to earn Benefit Points, which is now based on actual ticket price rather than travel class and route. Points also can be converted to sustainable aviation fuel. Additional “adjustments and simplifications” to the program will be introduced later this year.

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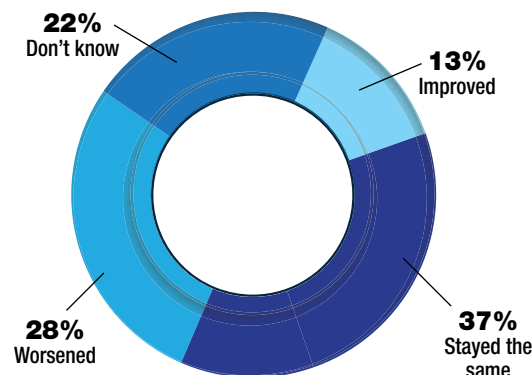


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In October, Delta will begin rolling out its new SkyMiles for Business program, which will supersede its current Sky-Bonus travel rewards program for small to midsize companies. The web-based tool allows users to book and manage travel and will feature new reporting and administrative capabilities and an easier way to track expenses, according to

How Have Supplier SME Programs Changed Since Pandemic?



Source: A BTN June-July survey of 151 small and midsize enterprise travel and procurement managers

the airline There will also be greater flexibility for companies to move through different tiers within the program, as well as greater customization of available benefits.

“Even if [companies] don’t have a travel policy, these tools allow them to manage their travel, manage their spend and manage their employees better than they could yesterday,” said Delta senior vice president of global sales Bob Somers.

Somers said the move is part of the carrier’s larger strategy to “continuously listen” to customers and offer a travel solution “at any scale.”

The fact that SME business for Delta is the carrier’s fastest-growing channel with higher yields and higher margins than larger corporate clients is also hard to ignore.

“If you look at that [SME] passenger recovery versus 2019, it’s 20 points higher than our larger corporate agreements. And in our SkyMiles account base, it’s 13 percent higher than it was in 2019,” Somers said.

“We’ve been putting incentives and resources towards this channel for a long time,” he added. “We’ve just stepped up our game because the game has stepped up. ... We’ve invested tremendously into this channel, not just technology like SkyMiles for Business, but we’ve also invested in the human capital and resources, putting more sellers towards this channel, putting more tools and more policies and procedures.”

Delta isn’t the only carrier putting more resources into their SME strategy. American Airlines restructured its sales team in February to put more emphasis on the segment. It created a new division specifically for midmarket sales that will focus on uncontracted and non-managed business

travel. The airline has yet to announce new programs specifically targeted to this business travel segment.

TMCS OFFER TARGETED TOOLS

Larger TMCs are sharpening their focus on the SME segment as well, and a series of strategic moves has led to the introduction of new products and services, often predicated on ease of use and easy integration. Several target the unmanaged business travel category and combine travel and expense management with traveler assistance as an ‘all-in-one’ solution.

In July, BCD Travel launched in the U.S. GetGoing, its digital platform for small and midsize clients. First launched in Germany last year, GetGoing provides a booking platform, a reporting tool, traveler safety information and policy automation capabilities as well as support from BCD experts on travel and booking assistance, budgeting and emergency support.

BCD Travel midmarket division president David Mitchell said the TMC “saw a gap in the market” to launch a proprietary, ‘turnkey’ offering because many existing solutions come with “lots of administration complexities” that can be cumbersome for small and midsize clients.

“What we’re trying to bridge into the market is something that has [self-service travel and expense] capabilities, but they don’t have to be overengineered,” he said.

GetGoing has three pricing tiers: ‘Go Free’, which includes BCD-negotiated and GetGoing-exclusive content as well as basic travel policy settings. ‘Go Travel’ has a \$4.95 per trip fee and enables companies to load their own fares and rates and access unused ticket tracking software. The third tier will be made available in the first half of next year and will include an integrated expense module.

Mitchell, who oversees Acendas

“If you look at that [SME] passenger recovery versus 2019, it’s 20 points higher than our larger corporate agreements.”

– DELTA AIR LINES’
BOB SOMERS

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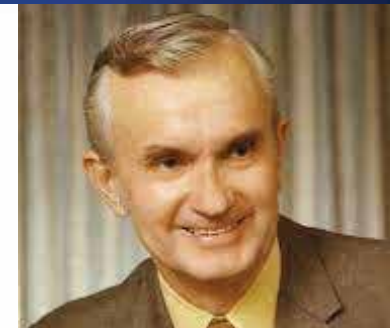
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Travel, Adelman Travel Group and World Travel Service, said the group long has had its eye on the SME market, but noted that broader interest in the segment has recently increased as new business emerges.

“I think everybody sees this part of the market has a bright future,” he said. Referring to suppliers he added, “everybody wants to get in early and try to build a foundation with these groups of travelers and these companies... but it can be tough to tap this part of the market.”

American Express Global Business Travel in January re-structured its entire business around a segment-driven model to intensify its focus on SMEs. The move followed a series of acquisitions in 2021 that GBT VP of global SME customers Maria Haggarty said has given the TMC the ability to “meet the core needs” of customers in this space.

This includes Egencia, the TMC’s “turnkey” solution that can be scaled globally, and Ovation Travel, which provides high-touch service. Combined with the group’s own Neo1 spend management tool for SMEs, Haggarty said the group’s broader strategy is to “meet customers where they are” by offering “the broadest and deepest set of solutions.”

Recent updates to Egencia include a new suite of APIs designed to make it easier for companies to share travel and expense data, and additional ground transportation options in the U.S. and Canada via an integration with GroundSpan.

“Continuing to evolve solutions over time is exciting, and rallying around the SME customer is powerful,” Haggarty added. “At the heart of our strategy is designing solutions around ease ... and balancing tech versus human personalization.”

In its first-quarter earnings report, the TMC noted a 61 percent increase in SME transactions compared with the same period in 2022. In the 12 months prior, Amex GBT won \$2.2 billion in annual business from SMEs, including 30 percent from organizations whose travel had been unmanaged.

“There’s a huge opportunity in the SME segment, particularly in unmanaged travel,” Haggarty said. “During Covid those travelers continued to travel because they were thinking about their business. ... They were out fighting for their businesses. I’m excited to see so much interest in enabling companies like this to grow because its critical to the overall economy.”

Meanwhile, CWT has turned to partnerships to enhance its SME offering and recently expanded its cooperation with Booking.com for Business to provide a travel booking platform with 24/7 agent support.

Booking.com for Business, powered by its partnership with travel tech supplier Serko, combines Booking.com lodging content with hotel, flight and car rental content from CWT. The content includes discounted business travel rates and membership rewards from third-party loyalty programs, according to CWT.

“When you put all that together—plus the fact that there’s zero subscription, booking, or travel support fees—it’s a very attractive proposition for small and medium-sized businesses that want a user-friendly and cost-effective travel solution without all the bells and whistles,” said CWT global market management VP Tammy Morgan.

“I think everybody sees this part of the market has a bright future. Everybody wants to get in early and try to build a foundation with these groups of travelers and these companies... but it can be tough to tap this part of the market.”

—BCD TRAVEL'S
DAVID MITCHELL

TMCS OFFER TARGETED TOOLS

Recent proliferation of propriety and partnership-led booking tools means more choice for buyers—and more competition for the SME buyer.

“This is an extremely competitive market and there are new products, new players coming out all the time,” said Graeme Milne, head of corporation sales for the U.K., Ireland and Nordics at Amadeus Cytric Solutions.

“Reseller partners we work with offer a ‘menu’ of technologies. They want to give customers choice, and customers want choice,” he added.

This is driving innovation at Cytric, Milne said. A recent example is Cytric Easy, which allows users to search, book and share travel (and manage expenses) within Microsoft Teams.

Milne said Cytric Easy is “well suited” to SMEs, but there’s more work to do. “This is a market we are focused on; we’ll continue to develop products and offerings for it.”

Despite the hype, Palmetto Infusion’s Litt said she hasn’t received any extra attention from hotel or airline suppliers and still feels a “disconnect” with the big TMC players, with fears her account would be overlooked. She’s also wary of becoming too automated, given travel’s current complexities.

“I like to build relationships and talk to people,” she said, adding that she’s not looking for an anonymous set-it-and-forget-it solution. “I want a supplier that knows our business and knows our company because we’re here to serve patients that are chronically ill.”

The TMC that has piqued her interest most promises that the person who makes the sale will oversee the account management. “So, there’s never that disconnect between sales and ops,” Litt said, “and they have a vested interest in how you are using their product and services.”

United Airlines

When it comes to business travel, United for Business offers something for everyone. Even if your SME doesn’t have a corporate travel agreement with us, you as an individual traveler can take advantage of many of our programs to save money and earn rewards on business (or “bleisure”) travel.

Here are five easy ways you can get started:

1. MileagePlus Benefits

Airline loyalty programs, like [United MileagePlus](#)®, are a great starting point for individual traveler benefits. MileagePlus offers the most ways to earn and use miles.

You’ll earn miles by flying or by engaging in everyday activities likes shopping or dining at participating stores and restaurants. Your miles can be redeemed for travel as well as other purchases such as [United Club](#)SM access, [inflight Wi-Fi](#), seat upgrades and more.

If you’re not already a MileagePlus member, it’s free and easy to [sign up](#).

2. Status Match

The [MileagePlus® Premier® Status Match Challenge](#) offers top-tier flyers of many other airlines a comparable Premier status in the MileagePlus program.

If you meet the criteria to participate in the Premier Status Match challenge, your account will be upgraded to the corresponding Premier status based on the level you hold in your current frequent flyer program. Keep your Premier status by earning a certain number of Premier qualifying points (PQP) and Premier qualifying flights (PQF) within your offer period.

Complete the [challenge form](#) to be considered for the program.



3. United Credit Cards

Another way to earn award miles and other rewards is through a [United credit card](#). There are several card options available from Chase, depending on your travel needs. Plus, there are even cards specifically for small business owners.

Some cards even come with added perks like United Club memberships, free checked bags or priority boarding.

4. Mile Play

United targets many individual travelers who have flown for business with a Mile Play offer. These offers award MileagePlus miles to members after they complete a personalized set of airline activities in a given time period.

Mile Play assigns customers unique offers based on their past behavior. Each customer receives a personalized number of actions to take, a personalized spend threshold, and a personalized number of reward miles for completing their actions. For example, an infrequent business traveler might receive an offer to earn bonus award miles for purchasing and flying in Economy Plus® in a given period. A more frequent business traveler might receive an offer to earn more bonus award miles by purchasing four premium flights.

Mile Play promotions are live periodically for most of the year. Travelers can check if they are targeted for an offer at any time by visiting [united.com/mileplay](#) and entering their MileagePlus number. Offers vary by member and time period.

5. United Partner Benefits

As a MileagePlus member, there are many benefits available through United’s partners.

For example, through the preferred partnership between United MileagePlus and [Marriott Bonvoy](#)TM, MileagePlus members with Premier Gold status and higher can register for complimentary Marriott Bonvoy Gold Elite status.

No matter your company size or even if you’re “flying solo” when it comes to business, United has programs and products that can be customized to fit your needs. You can explore more and get started today at [united.com/business](#).



Learn all the ways you can earn and use miles at [united.com/mileageplus](#).



SMALL & MIDSIZE FIRMS HITTING REFRESH ON TRAVEL MANAGEMENT

BTN surveys SMEs on how they structure their travel operation, approach spending and policy and their actions and goals for 2023.

BY LORRAINE SILEO

The pandemic hiatus and recovery had a clear impact on travel management at small and midsize companies, leading many to reevaluate their policies or build a program where there was none. Many have sharpened their focus on employee needs, risk management and savings considering rising travel costs and safety concerns. For some, prior travel policies were not giving them the visibility they needed to make good decisions, whether they were unmanaged, lightly managed or tightly managed. Reevaluating customer needs, technology, partners, and policies—or building a policy from scratch—has become commonplace in this new, riskier environment. SME travel programs were seemingly forced to develop overnight, and many SMEs now lead the way as travel management evolves.

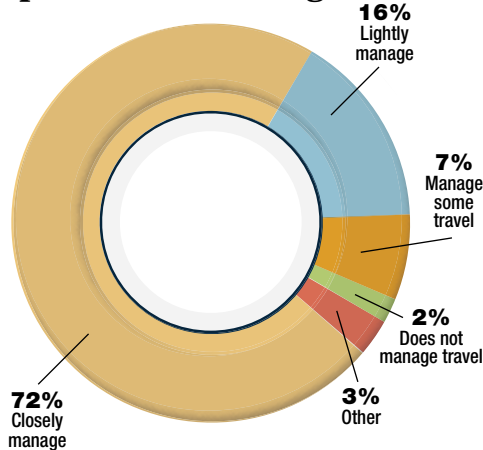
Though SMEs might be nimbler and more flexible than larger corporations, they still value travel management and the benefits of a tightly run program. According to the BTN's SME survey results, more than seven in 10 respon-

dents closely manage travel, while 16 percent run a lightly managed program. More than half (53 percent) have a dedicated, full-time, in-house travel manager, while about 32 percent have someone in the organization with travel management responsibilities along with other duties.

"We are centralizing all travel and expense management in one department rather than each division being responsible for their own, thereby ensuring that everyone is traveling under the same rules," one travel manager respondent told BTN.

Travel is in the spotlight as finance and upper management seek more cost control, especially considering inflation and economic concerns. Nearly half of respondents said their organization is managing travel more closely than before the pandemic, while only

Organizational Approach to Travel Mgmt.



Source: A BTN June-July survey of 151 small and midsize enterprise travel and procurement managers

3 percent have a looser policy. When asked about their travel management policy goals or plans for 2023, tighter management was high on the list. "We need to drive compliance and implement cost savings technologies and tools,"

Avis Budget Group

Small and medium-sized businesses have continued to lead the pack in business travel recovery, despite the many complexities and challenges the economy has provided. With uncertain times, travel managers need a supplier they can trust to get their travelers from point A to point B quickly, safely, and efficiently. They need a partner who understands their unique travel needs and can adjust swiftly to serve their evolving travel demands. Fortunately, Avis Budget Group not only offers SME's best in class account management but also a rewarding travel program that helps reduce expenses while providing an enhanced customer experience.

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- Business rewards on every rental
- Dedicated Member site to view transactions and redeem rewards
- Flexible billing options
- Dedicated Account Management team for high touch care that's always just a call or click away
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Investment in Technology

We are actively evolving our business to meet the present and future needs of our customers. Our long-standing investments in technology provide innovative solutions to improve and enhance rental experiences, plus change how you manage travel. We continue to expand our touchless experience called Quickpass. The service allows Avis customers to choose their vehicle on our award winning app upon arrival while being sent a QR code which can be used to exit our facility through an automated exit gate process.

We continuously evaluate opportunities to leverage technology and build new business models. Our long-term investments in connectivity, mobile digital user experience, new technology partnerships, and self-service fleet management ensure we are in the best position for growth in a new transportation world.

Plan On Us

You have places to go and people to see, and the last thing you need is a curveball. We understand that and dedicated to helping you keep things on track — because you deserve a rental car company that takes your plans as seriously as you do. We know what's at stake when travelers leave home and we value that you trust us with your plans. For 75 years, we've cultivated a company-wide philosophy that puts the customer first and foremost in everything we do. Why? Because we're driven by you. For 75 years, our only plan is to make sure you keep yours.

Our goal is simple: Plan on us to make it easier to manage your car rental program so you can focus on your business. Our program is not just about discounts on car rentals—it's about the entire experience. You can look to Avis Budget Group to uncover new opportunities as we evolve our core offerings and make renting a car easy and rewarding.

avis budget group

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BUYER PERSPECTIVE

said one. Others mentioned new travel policies with “more oversight on spend,” especially for international travel or “high-cost tickets.” Another implemented “executive leadership dashboards on travel.”

However, a tighter policy doesn’t necessarily limit traveler perks, as there can be trade-offs and compromise. “We permitted reimbursement of ancillary services, such as priority boarding and paid seats. We limited the use of private car services and launched Uber for Business,” one travel manager explained.

BACK TO NORMAL?

Six in 10 travel manager respondents projected their organizations’ 2023 business travel spending would match or exceed 2019 levels. With that move toward “back to normal” status, 58 percent indicated no changes in company travel policy rules during the past 12 months. But for those 41 percent who did report changes in the past year rules for most were tightened, as 70 percent reported more or stricter rules versus fewer or less strict rules. According to one travel manager with travel compliance above 80 percent, “there is always room for improvement.”

A BALANCING ACT

For most SMEs struggling to attract and retain talent, traveler satisfaction is high on the agenda. Many spoke about adding new programs to improve the traveler experience, including increased meal allowances, more generous long-haul flight policies, higher hotel caps, and more flexibility around combined business and leisure travel. Duty of care also remains a top priority as companies seek to keep their employees safe. But as prices keep rising, there could be closer scrutiny of spend. “SMEs are hyper-focused

“SMEs are hyper-focused on cost control, savings and visibility.”

— NAVAN’S DAN CORWIN

on cost control, savings and visibility,” according to Dan Corwin, executive revenue leader at travel management company Navan, leading many to tighten their rules to stay within budgets.

Managing costs against traveler needs requires better tools and tighter management. SMEs are seeking improved access to data, both current and forward-looking, to understand the impact of traveler-focused policies on the budget, while also keeping employees’ best interests in mind. “We need to smooth out the travel experience, build easy tools to educate staff on policy, and reduce costs through compliance where possible,” said one travel manager.

Brianna Lazzaro, group travel manager at medical device development firm Globus Medical, is prioritizing that travelers are “comfortable, happy and safe” over cost. As travel continues to be scrutinized by finance and upper management, it is important to remember that “travel is really personal,” and “it’s a balancing act” to keep all stakeholders satisfied, she said. Audubon, Pa.-based Globus Medical is in the process of rewriting its T&E policy with certain changes in mind, including updating permitted classes of service, days of rest, long-distance travel rules and hotel room rate caps for its employees.

Renegotiating with suppliers and pushing preferred vendor usage is another key initiative for 2023. “We are looking at air spend and working with preferred vendors to home in on key markets for cost savings,” said one

Organizational Changes to Travel Policy, Last 12 Months

More and/or stricter rules	29%
Fewer and/or less strict rules	12%
No change	58%
Don't know	1%

Source: A BTN June-July survey of 151 small and midsize enterprise travel and procurement managers

travel manager, who may field a ground transportation company request for proposals this year, “due to the rising costs of transportation.” Another wants to “push preferred vendor usage through custom messages and communications.”

TMCs ON NOTICE

Some SMEs are putting TMCs on notice and are looking to renegotiate, consolidate or replace their current TMCs and online booking tools. Faster turnaround, better self-service, New Distribution Capability connectivity and synching with mobile apps are among some of the imperatives they are looking for in a partner. Many mentioned

plans to consolidate their TMCs, and one said it was time for “OBT refinements or replacement.” Another planned to “switch to a new TMC and deliver new key performance indicators to budget owners.”

SMEs must provide greater service in some cases with fewer staff, raising the importance of effective automation. SMEs reviewing their travel policies often are seeking more self-serve options and easy-to-use tools so they can manage effectively with smaller teams, Corwin said. He mentioned implementing AI offerings, including Navan’s AI-powered chatbot, Ava, as an example of a ways SMEs can gain efficiency through self-service. Lazzaro agreed, adding Globus is looking to incorporate AI into its offerings to make self-service “easy and seamless.”

Other respondent travel policy goals for 2023 include improved duty of care, increased sustainability efforts, and preparedness for NDC. “We need to source a TMC that can fully operate with NDC changes,” one manager wrote.

TEAM TRAVEL

More companies are traveling to bring their teams together during a shift to hybrid work. The BTN survey found that 84 percent of responding companies had some sort of flexible work policy, and only 10 percent

47%

Respondents whose companies are managing travel more closely than before the pandemic.

required all employees to work on site every day. These new patterns of travel, in which remote employees often meet at headquarters or other central locations, have driven many changes to the travel program. “We are more flexible with flight locations in the remote work environment,” wrote one respondent.

SMEs are broad and diverse, and their travel management goals vary widely based on size, industry, and other variables. However, SMEs often share a common desire to build robust travel programs that empower better decision-making. It’s all about “control, visibility, efficiency and self-service,” said Corwin. SMEs have sharpened their vision for travel’s role in the organization and are now better prepared for the next phases of travel management. ■

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SMALL COS. AGAIN SCRUTINIZING TRAVEL APPROACHES

Small travel programs look at new policies and guardrails in a complex travel landscape.

BY MARK FRARY

Greenville, S.C.-based cloud technology connector ScanSource is new to managed travel. The 2,200-employee company hired Shannon Wilson as a dedicated travel manager in 2022 to put some strategy behind its spending, which now exceeds its pre-pandemic annual volume.

The company uses specialized business travel programs suppliers have devised to attract this growing small and midsize slice of the travel market. ScanSource taps these programs to make its travel budget more effective by applying discounts, garnering benefits and securing data to manage the company's growing travel needs. And Wilson is pulling some classic—and some new—levers to ensure ScanSource travelers are making the most of their business travel budgets.

“Our focus is on traveler duty of care, convenience and cost savings,” Wilson said. “We encourage our travelers to practice discretion and frugality when making their travel arrangements. This includes making travel decisions based on convenient, safe, cost-effective options, as opposed to only [relying on] frequent-guest programs.”

In terms of newer strategies, demand management is always on the table, she said. ScanSource now sees how business can be conducted effectively via remote technologies. As travel opened back up, the company continues to “keep an eye on travel,” opting for virtual solutions when possible. Yet, added Wilson, “travel remains a necessity” for the expanding company, and one that requires more support than it did in a pre-pandemic world.

“Our focus is on improving our travelers’ customer experience,” she said, “as challenges in the travel industry remain, including the shortage of staffing ... and travel disruptions.” To that end, the company manages its travel program with the support of a travel management company, a preferred corporate online booking tool and corporate card.

“We take a very hands-on approach, working closely with our employees to ensure continued compliance with our travel policies and an awareness of travel best practices and cost-saving opportunities,” she said, noting that supplier-provided SME programs had improved since pre-pandemic times.

But moving to a more fully managed travel program takes time, and Wilson has plans to do “complete upgrades” to the travel policy this year and has started working on a TMC request for proposals to be launched later this year.

SME FIRMS IN THE DRIVER'S SEAT, THE AIRLINE SEAT, THE HOTEL BED

ScanSource isn't alone in putting new guardrails on a smaller-sized travel program. Travel complexity is one reason, as Wilson noted; rising expenses are another. At the beginning of 2023, Morgan Stanley in a corporate travel outlook for the U.S. noted that 32 percent of smaller companies said travel budgets had returned to pre-pandemic levels compared with 23 percent of big firms that had done so. BTN's more recent survey showed that 59 percent of responding small and midsize firms had returned to or exceeded pre-pandemic travel spending levels.

TravelBank, an integrated expense and travel management platform focused on SME programs, has seen demand returning, according to CEO Duke Chung.

“We have seen travel come back very strongly since Covid because

of the return to work and people wanting to attend conferences and offsites with their employees,” according to Chung.

Yet growing demand is not coming across the board.

“In certain sectors you see continuous growth in business travel although in some sectors due to market changes, particularly technology companies, you do see a slowdown in travel,” he said.

Chung said many SMEs look to manage travel and expense with a single facilitator, like TravelBank, which was acquired by U.S. Bank in 2021 and is adding a virtual card options. Other suppliers, like travel management company Navan, also have developed joint platforms. Legacy TMCs are getting into the game as well with products like American Express Global Business Travel's Neo1, but small and midsize specialists have been in the market for years, providing capabilities to support travel for small and midsize travel programs.

Chung underscored the ability for agencies to support unused ticket credits and access to discounted hotel rates among a number of other key offerings.

“SMEs had a lot of credits with suppliers, and they needed a way to be able to access that, so getting help from a travel management company... was really important to help restart travel for their businesses,” he said. “We also have consortia hotel rates which have previously been available for large companies, but this has not been as easily accessible for small businesses.”

SME PROGRAMS AREN'T OSFA (ONE SIZE FITS ALL)

Hyde Tools is a manufacturer of industrial machine and hand tools and decorating accessories. The company has six people who travel extensively and another four who are on the road less frequently. The

company spends around \$250,000 a year—about one-tenth on international travel.

Most of Hyde Tools' travel is to industry exhibitions or in-person meetings. The exhibitions, in particular, have started back up again, according to VP of sales Bob Clemence.

Prior to the pandemic, Clemence was on the road 120 days of the year. He said the figure is now under 100.

“The company has made a decision that we're cutting back—not the attendance of the show, but on the length of attendance at the shows,” said Clemence. “Most shows are three-day events and I used to be there for the three full days; now the company's got me going only two days. It's one overnight at a hotel.”

Beyond attendance at trade shows, there are the face-to-face meetings with prospects and customers, he said, but “a lot of that is now being done via Zoom or Teams.” He added that type of travel has been cut by at least 60 percent, but without sacrificing conversions.

“We've been closing [deals] and our closing is just as good as it was prior to the pandemic, maybe even slightly better,” said Clemence. “A lot of my competition hasn't been able to manage through the pandemic,” he said.

When the company does send travelers on the road, they manage their own trips.

“The travel agency went by the wayside over 10 years ago, and everything is being done online. Typically, we're using a flight tool which has now been bought by Google,” Clemence said, referring to ITA Software, which was purchased by Google in 2011 and now operates as Google Flights. “You can't book through, but it gives you airfare pricing, so I can utilize that and book the air.”

Yet, business travel at Hyde isn't without rules. The pandemic saw the company tighten its air policy. Previously, travelers could book any carrier whose fare was within 20 percent of the lowest logical fare. This has now been reduced to 10 percent.

“People tend to have favorite airlines because of status, so we're allowing that,” said Clemence. For lodging, Hyde takes a different approach to accessing preferred rates, but it's not through an agency. Rather, they take advantage of the bargaining power of their clients, since that's who they typically are traveling to meet.

“We're not big enough to contract ourselves, so we're utilizing our customers' contracts, which are definitely a lot larger than ours [would be],” he said. “They're booking 3,000 people, so we end up getting a halfway decent rate.” Again, there is a 10 percent rate margin within which Hyde travelers can book a preferred chain, if they can find one.

How Hyde knows what was available on the day, and whether travelers are honoring that rule is an open question. For Clemence it may come down to respecting the company and your coworkers. With just 10 travelers on the road, maybe that respect is stronger than rules anyway. ■

“We're not big enough to contract ourselves, so we're utilizing our customers' contracts, which are definitely a lot larger than ours would be.”

— HYDE TOOLS' BOB CLEMENCE



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Accor Business is designed for SME firms without requiring a contract with Accor. Members get discounts between 5 percent and 9 percent on business travel. Participating brands include All Seasons, Fairmont, Grand Mercure, Ibis, Mama Shelter, MGallery, Novotel, Pullman, Raffles, Sofitel, Tribe and others.

- Free to join
- Valid in more than 4,100 hotels worldwide
- Discount applied to best-available rate

AMERICAN AIRLINES, BUSINESS EXTRA

Business Extra is a travel loyalty program offering rewards to organizations with a minimum of three employees who travel on American and partner airlines British Airways, Iberia, Japan Airlines, and flights marketed and sold by AA, including Finnair and Qantas.

- Free to join
- Award redemption beginning at 100 points
- Member companies earn 1 point for every \$5 spent, depending on country and region
- AAdvantage status members can earn even more miles

AVIS BUDGET GROUP, AVIS FOR BUSINESS

Avis for Business program offers rewards for small and midsize enterprises and discounts on qualifying fleets. Reward Days discounts based on completing qualifying rental day.

- Reward Days require an Avis Worldwide Discount number and redemption fee may apply
- Reward Day redemption varies by location and is excluded for Economy and Premium in some countries

BEST WESTERN, BUSINESS ADVANTAGE

Best Western's Business Advantage program offers a North American membership and an international membership, but points and perks are earned globally.

- Exclusive discounted rates for qualified businesses
- Account owners are elevated to diamond

status, employees elevated to gold status

- Rewards range from 10 percent to 30 percent bonus points per night, depending on status.

CHOICE HOTELS INTERNATIONAL, BUSINESS ESSENTIALS

Choice's business travel program for small and midsize enterprises extends to 12 brands and more than 7,000 hotels globally. Qualifying business' employees earn rewards on business and leisure stays.

- Guaranteed discounts
- Direct line to dedicated account manager

DELTA AIR LINES, SKYBONUS

Delta's revamped small and midsize enterprise loyalty program SkyMiles rolls out in October. Any company may sign up, no minimum travelers or spend. Benefits accrue to businesses with at least five employees and annual travel spend of \$5,000.

- Companies can earn and redeem miles at Plus status
- Elite level requires five employee travelers and \$300,000 in annual travel spend
- Plus- and Elite-tier companies rewards include the ability to earn and transfer miles, eCredits, one-year Delta Sky Club individual memberships and SkyMiles Silver Medallion status valid for 12 months.

ENTERPRISE RENT-A-CAR, BUSINESS RENTAL

Enterprise's Business Rental program extends loyalty discounts to members for both National and Enterprise car rentals. Discounts include up to 5 percent off base rate, on standard published undiscounted daily, weekly and monthly driven rates, in the U.S. and Canada.

- Contracted rates honored at all Enterprise and National locations.
- Access to fleet in more than 90 countries and territories.
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HYATT HOTELS CORP., HYATT LEVERAGE

For companies of "all sizes," Hyatt Leverage offers members up to 15 percent off standard

rates at participating hotels worldwide. The program includes direct-booking capabilities.

- Users must first have a World of Hyatt account.
- Includes tracking tool within the administrator portal.

INTERCONTINENTAL HOTELS GROUP, BUSINESS EDGE

Built for small and midsize enterprise travel managers, IHG's Business Edge offers discounts across 6,000 participating hotels, peer-to-peer network, loyalty upgrades and guaranteed discounts. Members can also submit one request-for-proposals to up to 10 best-fit properties.

- Free to join and requires no minimum annual spend
- Members may book via web portal, phone, on IHG app or IHG.com
- Users upgraded to IHG One Rewards Silver Elite status after first IHG Business Edge stay

SONESTA, BUSINESS PASS

Sonesta's Business Pass offers discounts on best-available rates, meeting spaces and group block between 10 to 20 rooms, depending on dates and locations. The program also supplies a rate code and loyalty upgrade link unique to the organization.

- Members upgraded to Sonesta Travel Pass Elite Status upon enrollment
- Includes \$15 food and beverage credit at check-in
- On-demand meeting rooms, depending on date and location

SOUTHWEST AIRLINES, SWABIZ

Southwest Airlines' self-service SME program is a free booking platform and offers members access to the airline's GDS content and direct connect/API.

- Dedicated account management team
- Upgraded benefits for group travel of 25 travelers or more
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UNITED AIRLINES, UA SIMPLE

For business travel on United to North America, members get upfront discounts applied to every eligible employees' travel on United. Companies earn select United amenities based on flown revenue in the first year, including United Club one-time passes, MileagePlus Premier memberships and Global Premier upgrades.

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CONFERENCES & EVENTS

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2023 IN-PERSON EVENTS

BUSINESS TRAVEL trends & forecasts

WASHINGTON DC
March 21

ASIA PACIFIC
17 July

SAN FRANCISCO
September 19

PHILADELPHIA
September 28

BOSTON
October 26

DALLAS
December 12

ATLANTA
September

CHICAGO
September

TORONTO
September

MINNEAPOLIS
October

NEW YORK
November

SEATTLE
December

STRATEGIC MEETINGS SUMMIT

SAN FRANCISCO
June 5

NEW YORK
June 12

LONDON
October

CHICAGO
November 6

10th ANNUAL innovate advancing business travel

NEW YORK
October 2

BTN 39th ANNUAL TRAVEL MANAGER OF THE YEAR Awards

DALLAS
August 15

GOVERNMENT TRAVEL SUMMIT

WASHINGTON DC
October 23

12th ANNUAL BUSINESS TRAVEL HALL OF FAME

NEW YORK
December 6

entertainment TRAVEL SUMMIT

NEW YORK / June 6
LONDON / November
LOS ANGELES / Dec. 14

15th ANNUAL BUSINESS TRAVEL SUMMIT

PEBBLE BEACH
June 20-23

BUSINESS TRAVEL SHOW EUROPE

LONDON
June 28-29

BUSINESS TRAVEL TECH TALK

CHICAGO
May 1

SAN FRANCISCO
October 19

FRANKFURT
October

LONDON
November

AMSTERDAM
Q4 TBD

PARIS
Q4 TBD

16th ANNUAL The Beat live

NEW YORK
December 5

BUSINESS TRAVEL LODGING SUMMIT AMERICAS

AMERICAS
September

BUSINESS TRAVEL ACCOMMODATION SUMMIT EUROPE

EUROPE
September

BUSINESS TRAVEL SUSTAINABILITY SUMMIT & AWARDS

AMERICAS
May 8

EUROPE
22 May

BUSINESS TRAVEL AWARDS EUROPE

LONDON
October 30

2023 VIRTUAL EVENTS

3rd ANNUAL Travel Procurement VIRTUAL WORKSHOP SERIES

March 7

March 14

March 21

March 28

April 4

April 11

GLOBAL TRAVEL RISK SUMMIT

AMERICAS
September

EUROPE
September

BTNGROUP SYMPOSIUM

Advancing Traveler Health & Wellness
October

business travel intelligence summit

EUROPE
October

AMERICAS
November

BUSINESS TRAVEL SHOW AMERICAS

April 20

BTNGROUP SYMPOSIUM

Diversity, Equity and Inclusion Series
October

BUSINESS TRAVEL SHOW EUROPE KICK OFF

23 February

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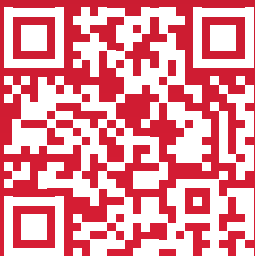
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