



World Travel
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SYMPOSIUM

FALL 2017

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VP, Global Account & Network Management

Global Trends

Driving a Successful Global Program

Agenda

- World Travel Global Footprint
- Emerging Markets / Market Trends
- Gathering Intelligence / What You Need To Know
- Setting Expectations / Communications
- Driving A Successful Global Program



Global Footprint

The Americas

Canada
United States
Argentina
Brazil
Chile
Colombia
Costa Rica
Mexico
Paraguay
Peru
Uruguay
Venezuela

EMEA

Austria
Belgium
Bulgaria
Czech Republic
Denmark
Egypt
Finland
France
Germany

APAC

Australia
Brunei
Cambodia
China
Hong Kong
Indonesia
Japan
Malaysia
New Zealand
Pakistan
Philippines
Singapore
South Korea
Sri Lanka
Taiwan
Thailand

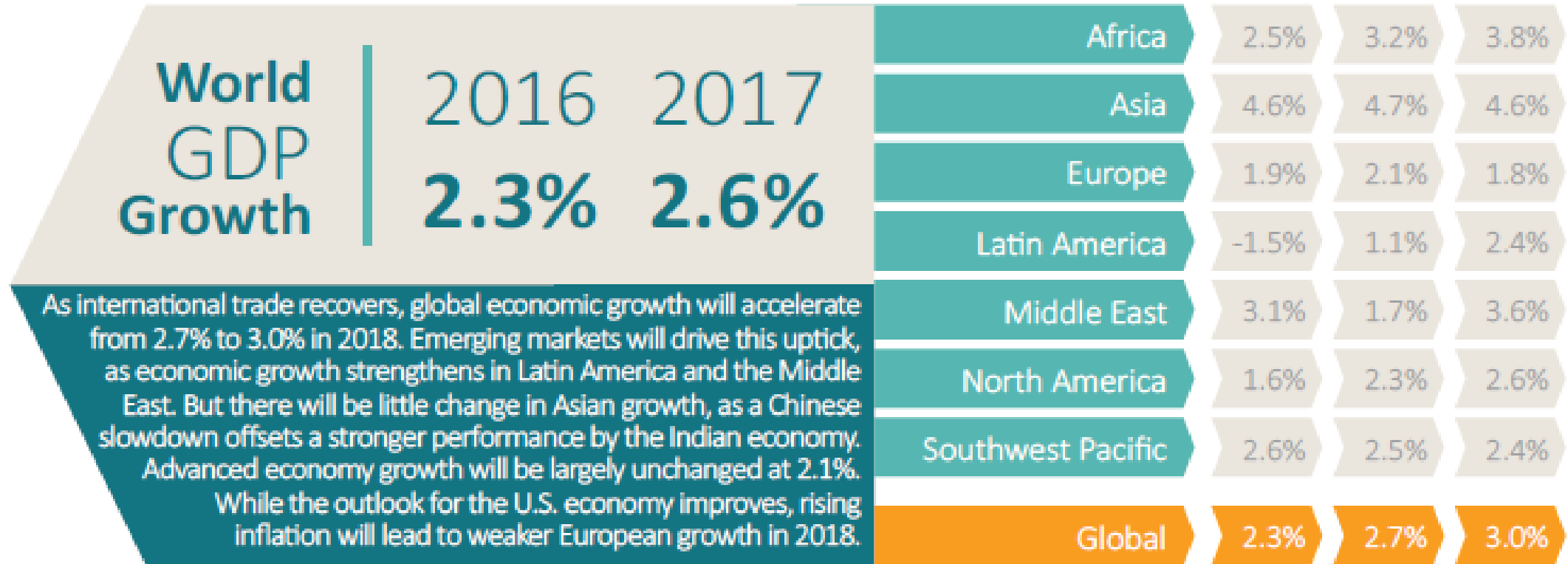
Emerging Markets Overview

- Growth expected in 2018
- Latin America – Brazil momentum, improving Argentina and Columbia economies
- Middle East – rebound in growth expected as oil production cuts end 1Q18
- Asia – Slowdown in China while India's economy continues with strong growth
- Europe – Political uncertainty keeps growth at a small increase of 1.5%



Economic growth assumptions

Regional economic growth forecasts 2016-2018³



Source – Advito Consulting

Market Risks

- Uncertainty of US trade policies
- Tensions in the Korean Peninsula
- European election outcomes & BREXIT uncertainty
- Oil price assumption \$50 per barrel



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Market Trends by Region

Airfare forecasts

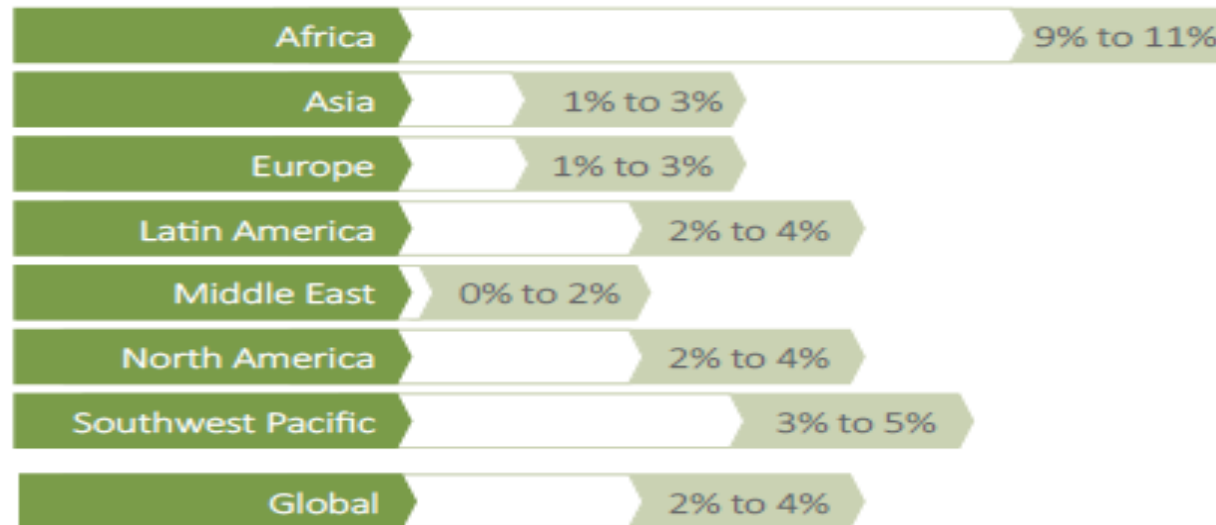
Average ticket prices % year-over-year

	Intercontinental		Regional	
	Business	Economy	Business	Economy
Africa	-1%	-2%	0%	0%
Asia	0%	-1%	2%	2%
Europe	2%	0%	1%	2%
Latin America	0%	-1%	-1%	-3%
Middle East	0%	0%	1%	0%
North America	1%	0%	1%	1%
Southwest Pacific	0%	-2%	3%	2%
Global	1%	0%	1%	1%

Source – Advito Consulting **Data to May 2017

Market Trends by Region

Hotel rate forecasts Average daily rates % year-over-year



Source – Advito Consulting **Data to May 2017



Market Knowledge is Key

- Gathering Intel
- What you need to know
 - How do travelers book today?
 - How many travelers?
 - What FOP is used?
 - Are there local relationships?
 - Do you have a local ally?



Setting Expectations

- Implementation 8 – 12 weeks
- Booking tool ROI
- Local buy-in (what's in it for me)
- Duty of Care
- Global policy
- Communicate what, when, why



Driving to Success

- Clearly define your goal – savings, service, duty of care, spend visibility
- Executive buy-in
- Ensure local content is accessible
- Make sure you have a form of payment that works in your markets
- Global Account Manager/local agency/client relationship
- Consolidated actionable data
- Make it Simple



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Q & A



Thank you!





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Integrating Meetings & Corporate Travel



Speakers



Kristen Koenig

Director of Sales, Global
Meetings & Events
World Travel, Inc



Valeri Fox

Vice President, Director
of Corporate Events
OppenheimerFunds



Charles Mueller

AVP, Accounts Payable, Corporate
Travel Expense and Card Services
OppenheimerFunds



Opportunity

A study by the U.S. Travel association (The Role of Business Travel in the U.S. Economic Recovery) found that of the \$225 billion spent in the U.S. domestic travel industry, 57% was for general business travel, and the remaining 43% was attributed to meetings.





State of the Industry

Transient vs Meeting Booking

1. Transient negotiated **annually**, not one by one
2. Negotiate and accept **multiple hotels**
3. Discounts based on **annual volume** rather than negotiated each contract
4. The company relies on the hotel to **load negotiated rates** in the GDS
5. Inability to track **actual data** in technology tools



Why Care?

By deploying a strategy to align transient & meetings, companies will gain:

- Strategic supplier relations
- Additional transparency for risk management/duty of care
- Potential to increase employee & traveler satisfaction and service
- Increased efficiency & consistency
- Improved resource alignment & utilization
- Greater ability to create leverage in the supplier market



**Improve
Compliance**



Save Time



**Increase
Visibility**





Laying the Foundation for Success

Q&A with Valeri & Charlie

OppenheimerFunds

- **Location:** New York City, NY
- **Industry:** Financial Services
- **# of Employees:** 2,000+
- **Active Travelers:** 1,200+ at least 3 trips per year
- **Corporate Volume:** \$5 million in Air & Rail - 55% Domestic & 45% International
- **# of Meetings:** 210+ per year



Describe how the OppenheimerFunds' travel & meetings alignment started.



For someone looking to get started leveraging their travel and meetings together, what could step one look like?



Travel and meetings are typically separate domains and everyone likes to own their own world – how do you suggest people begin to break down barriers?



Can you each provide an example of small wins that would help lead to long-term success?



What does long-term success look like?



What is next for OppenheimerFunds' travel & meeting program alignment?



Key Takeaways

Process Improvements

- Improved resource alignment & utilization
- Increased efficiency
- Streamlined communication
- End-to-end traveler/attendee visibility

Program Strategy Improvements

- Greater ability to create leverage in the supplier market
- Coordinated risk management
- Spend & Policy Management
- Cross-Functional reporting



Looking To The Future



Technology enhancements



Supplier changes



Internal alignment



Thank you!





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Duty of Care

Client Insights on How to Build a Duty of Care Program



Panel

Maureen Chorlton
Manager, Global Travel Services
Bioclinica

Shelby LeMaire
Global Travel Manager
iRobot

Maribeth L. Minella
EVP & Corporate Counsel
World Travel, Inc.

Moderator



What is Duty of Care?



**An employer's duty of care
cannot be delegated to another.**



Risk Assessment



Risk Tolerance



Phase I - Start to Put It on Paper

1. Draft an outline
2. Categorize your risks to primary, secondary, etc.; risks that the plan must address
3. Line up your existing policies to the risks you need to mitigate
4. Identify gaps

Identify your internal players.



Potential Internal Resources

- Executives
- Travel
- Human Resources
- Legal
- Risk Management/Security
- Insurance
- Information Technology
- Marketing

Who are your travelers?



Type of Travelers

- Domestic
- International
- Veteran
- Rookie
- Individual
- Group



What are their needs?



Needs

General/Mundane

- *lost luggage, luggage delays*

Travel

- *lost travel documents, lost passport; travel delays*

Medical

- *forgetting meds/lost script, lost glasses, dental emergency*

Personal

- *lost wallet, lost identification*

Legal

- *arrest, family members (long term assignments)*

Crisis

- *Ability to contact, evacuation, safety, security*

How do you get your travelers to pay attention?



Traveler Engagement

- Onboarding paperwork
- Intranet
- Itinerary
- Email
- Traveler newsletter
- Tied to expense reimbursement
- Employee handbook
- Training
- Trip Disruption Alerts
- Flight Alerts

Where are your travelers?



When do you ask for outside help?



Phase II – Complete the Text

1. Build out your outline
2. Plan communication campaign(s)
3. Table top exercise
4. Annual review

A planned response is the best response.



Questions for the panel?

Maureen Chorlton
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