



20th Annual Conference

SCTM Benchmarking Survey

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September 18, 2007

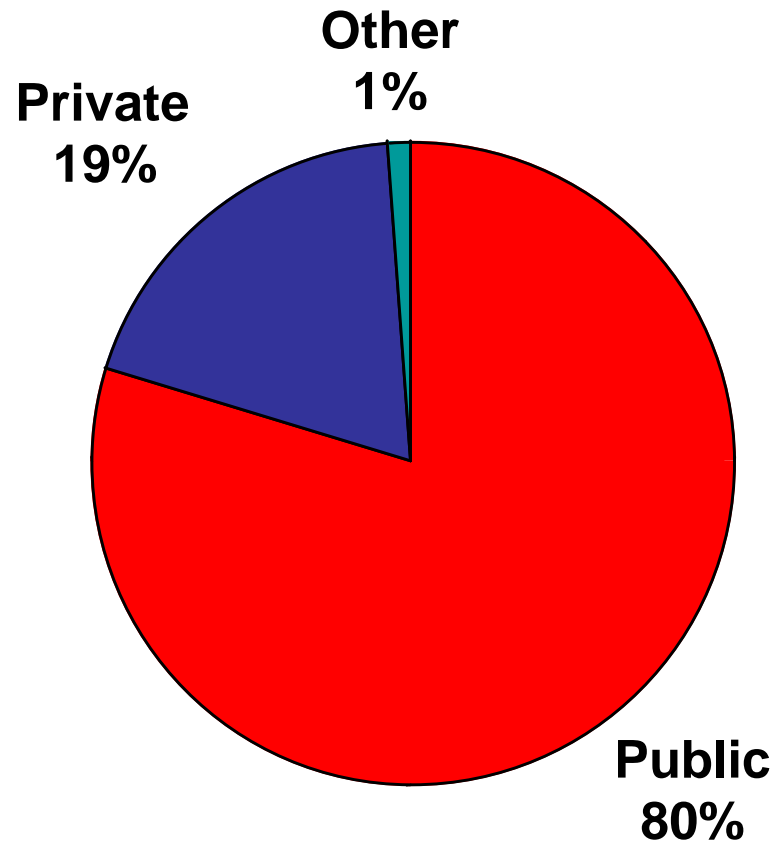


2007 Benchmarking Survey

- Tracks changes in vendor relations, service fees, technology, and travel program structure.
- **68** institutions completed the survey
 - 47 attending the conference

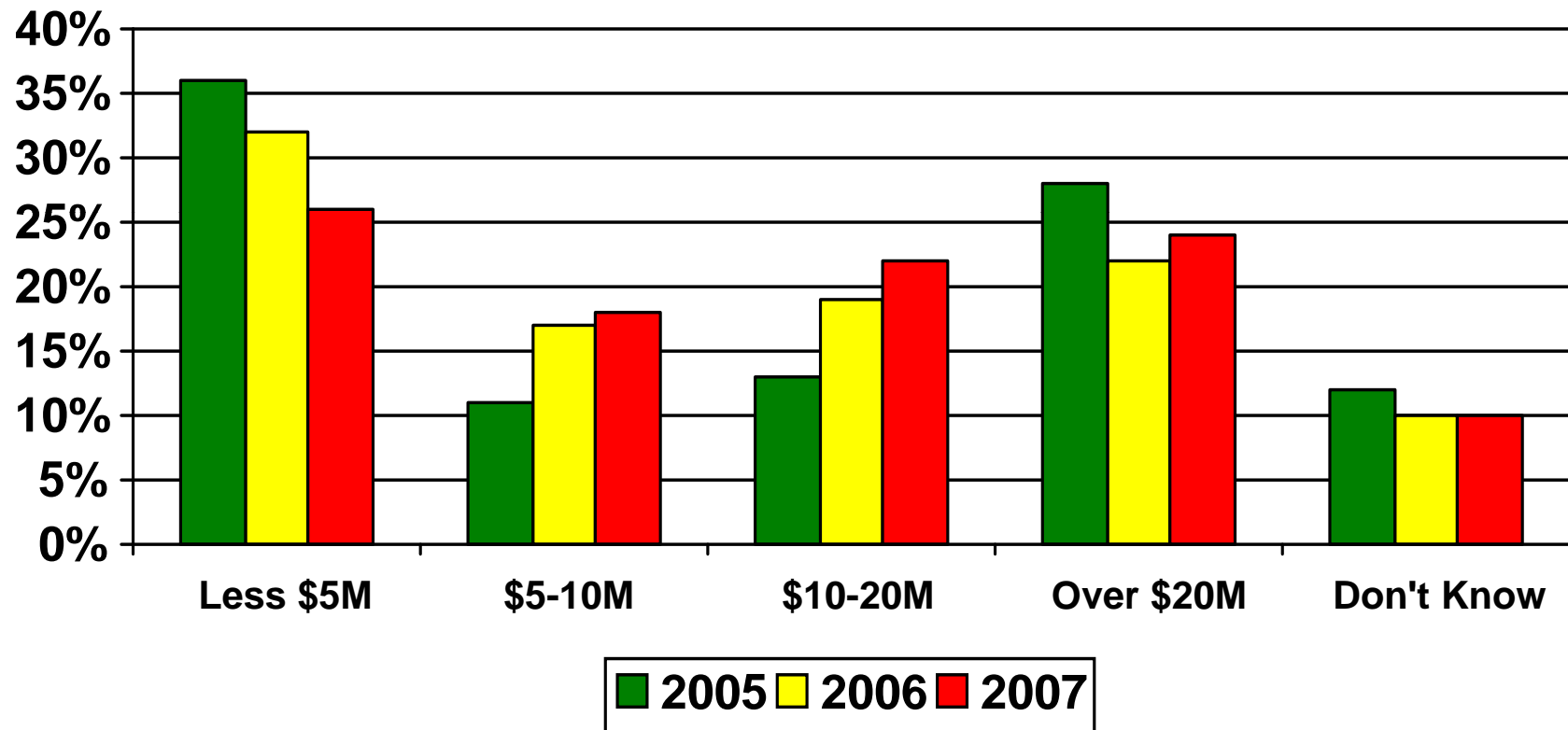


Institution Type





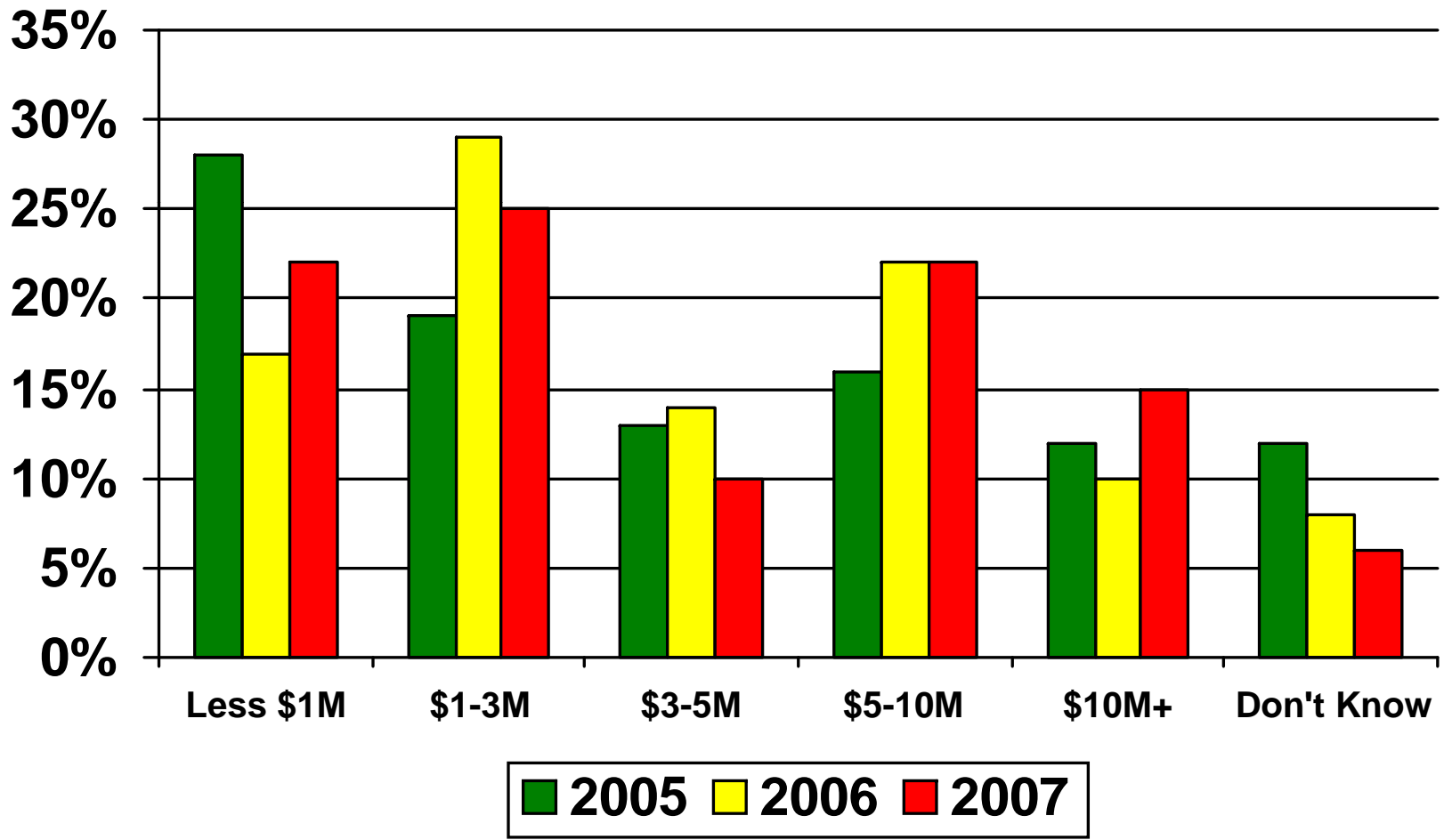
Annual T&E \$ Volume



- Total T&E spend may be increasing slightly

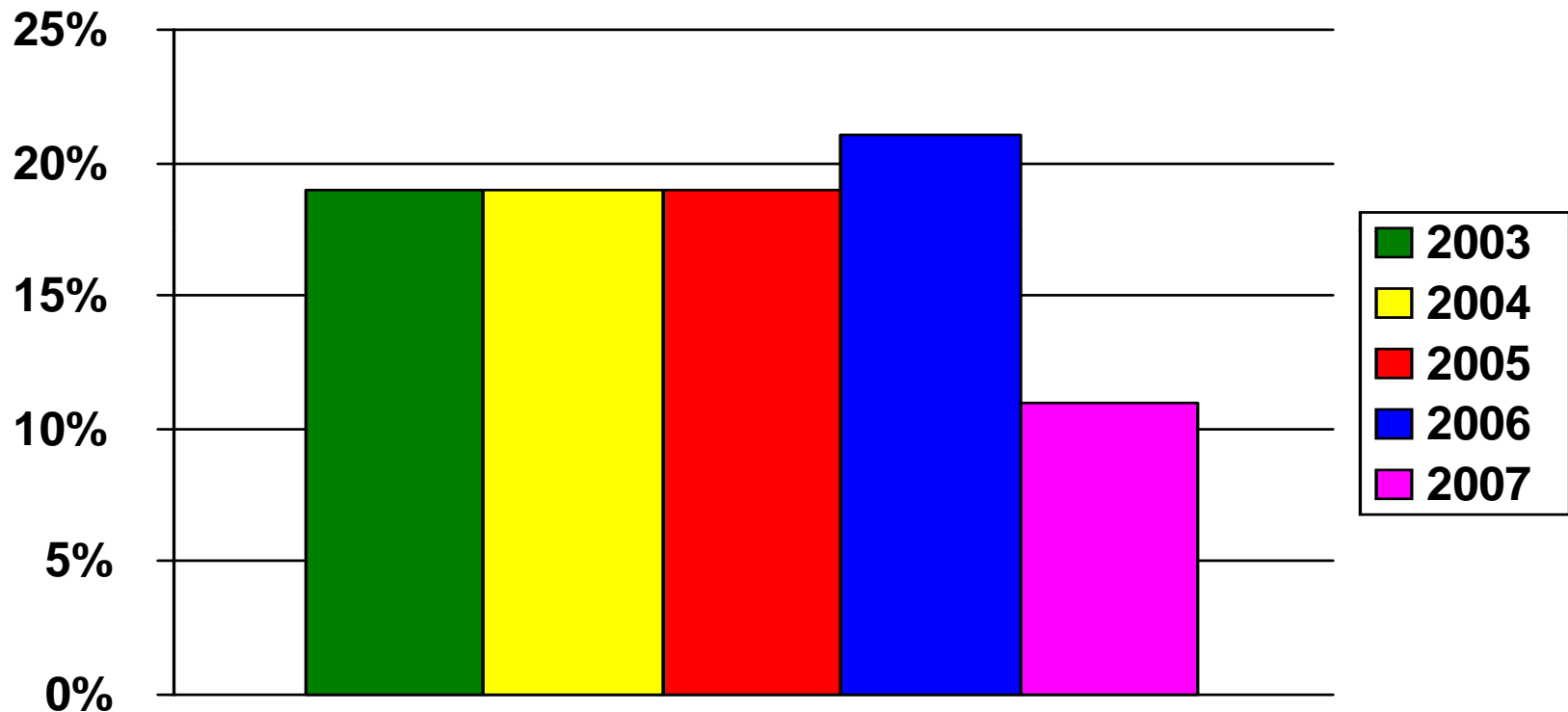


Annual Air Only \$ Volume





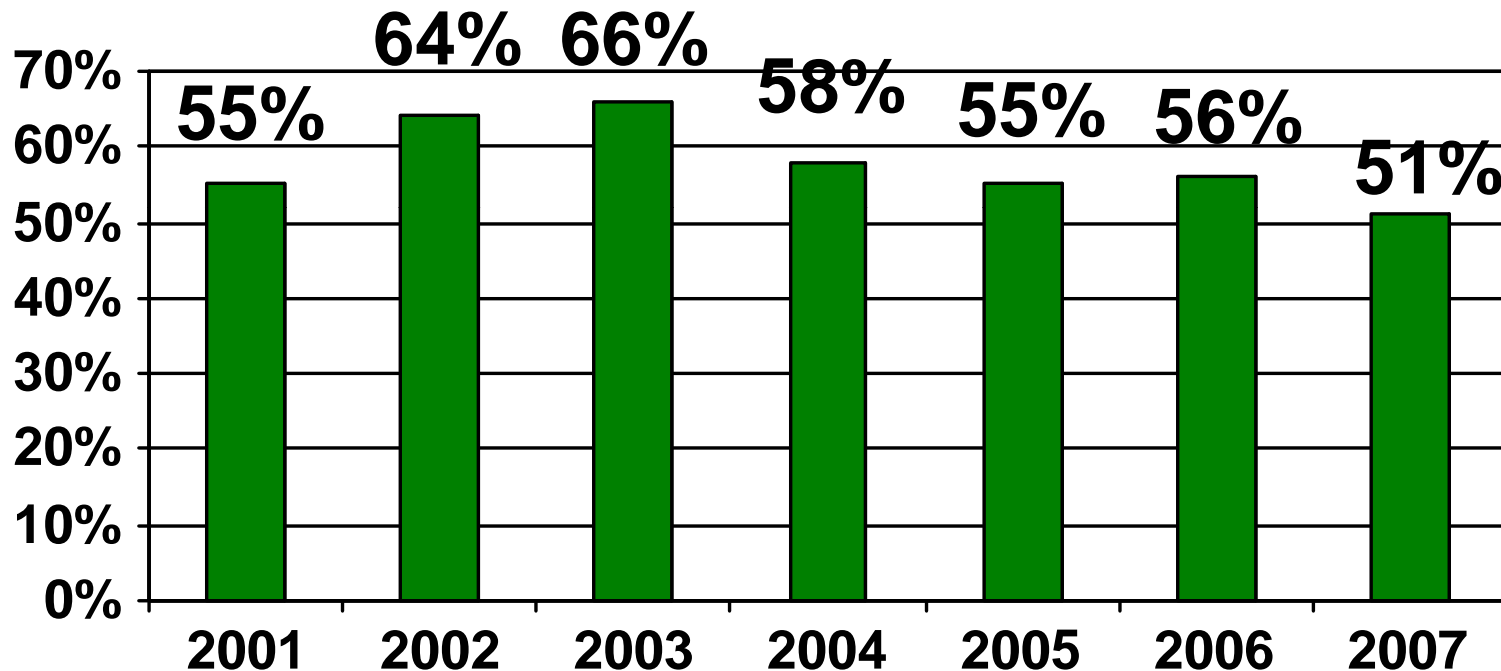
Percentage International Air by \$ Volume



- Significant decrease in International air \$ volume



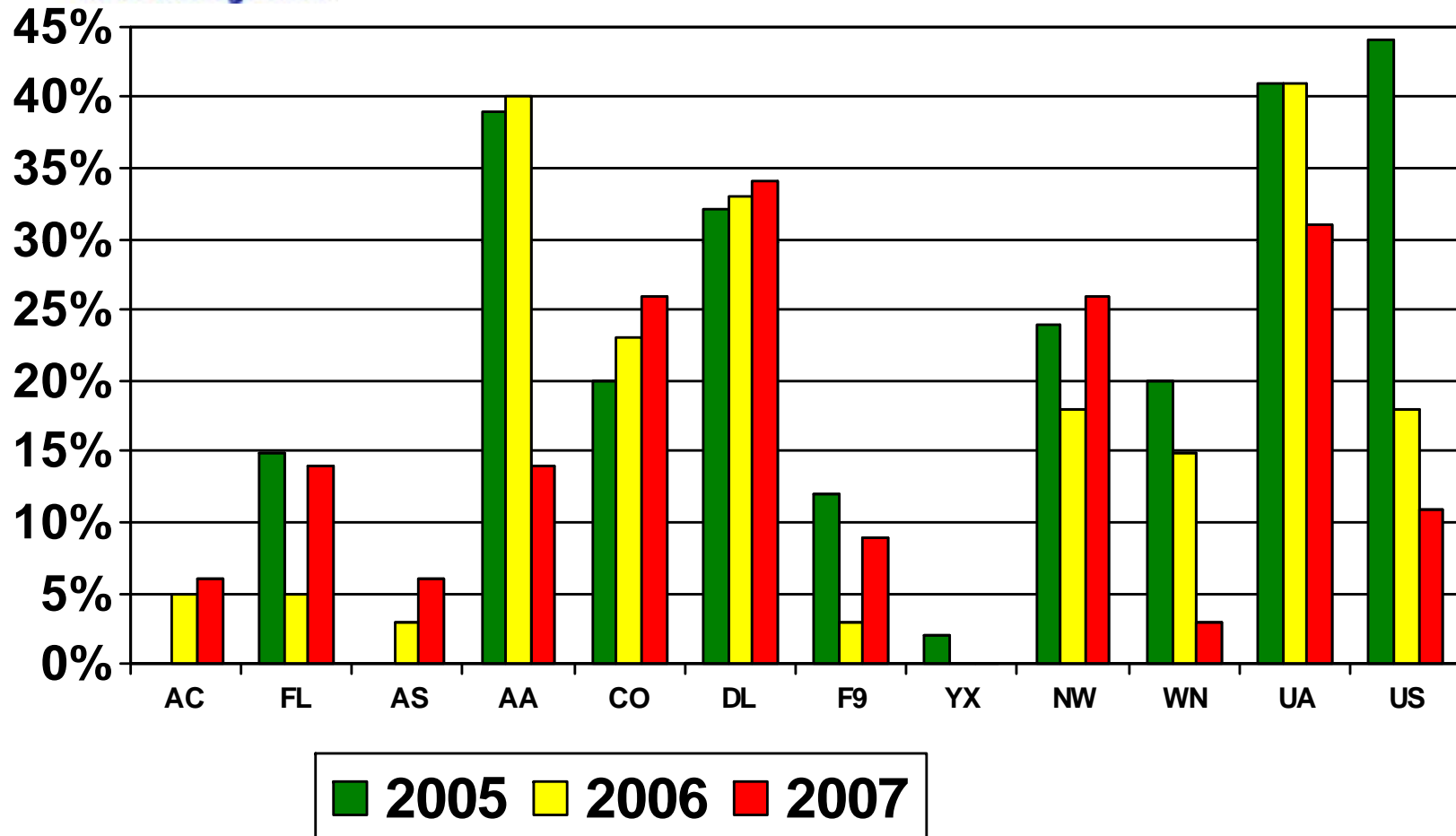
Survey Participants with Airline Agreements



- Future questions will focus on types of contract



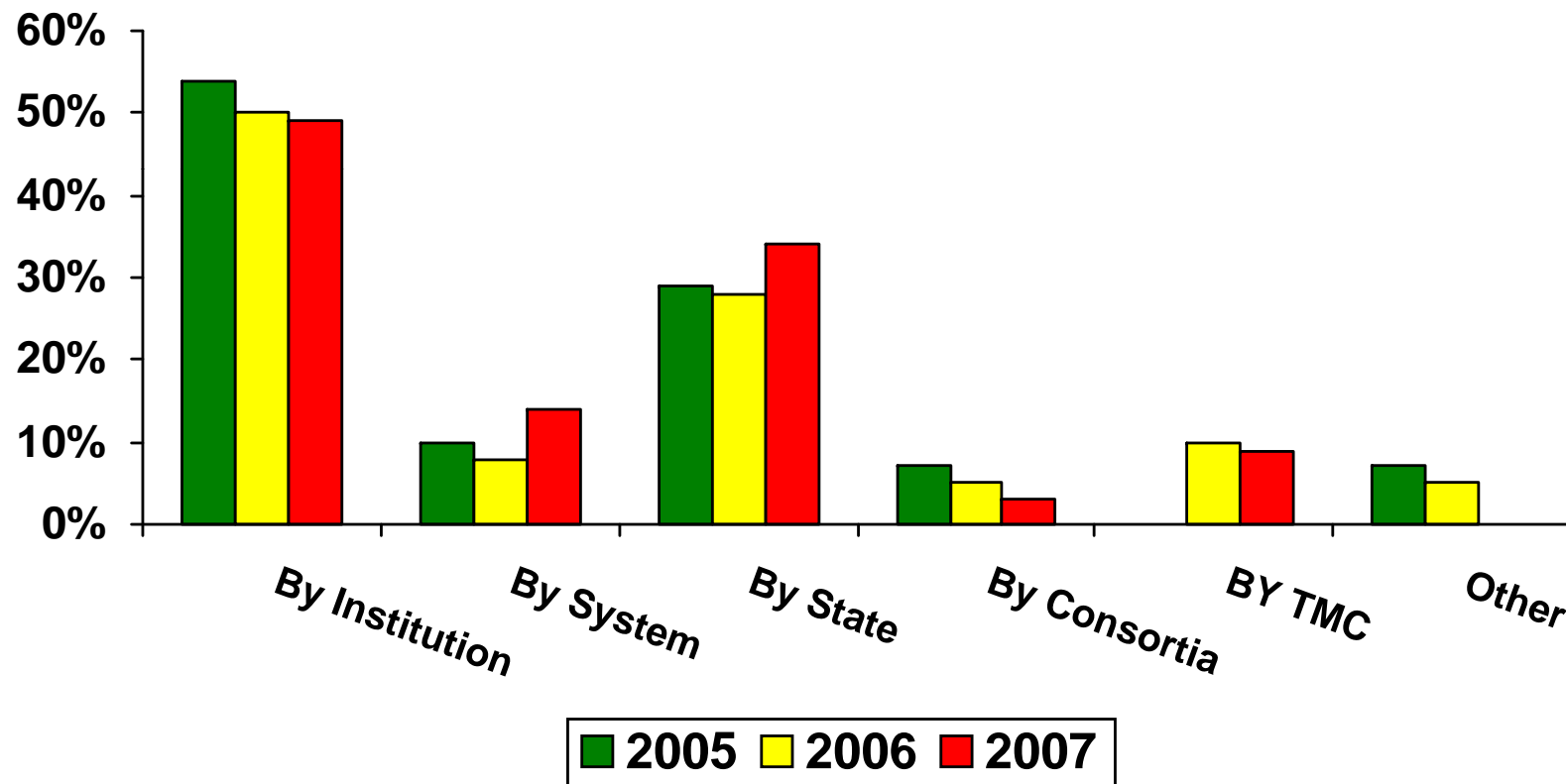
Contracted Airlines



- Significant decrease for American, Southwest and US Air

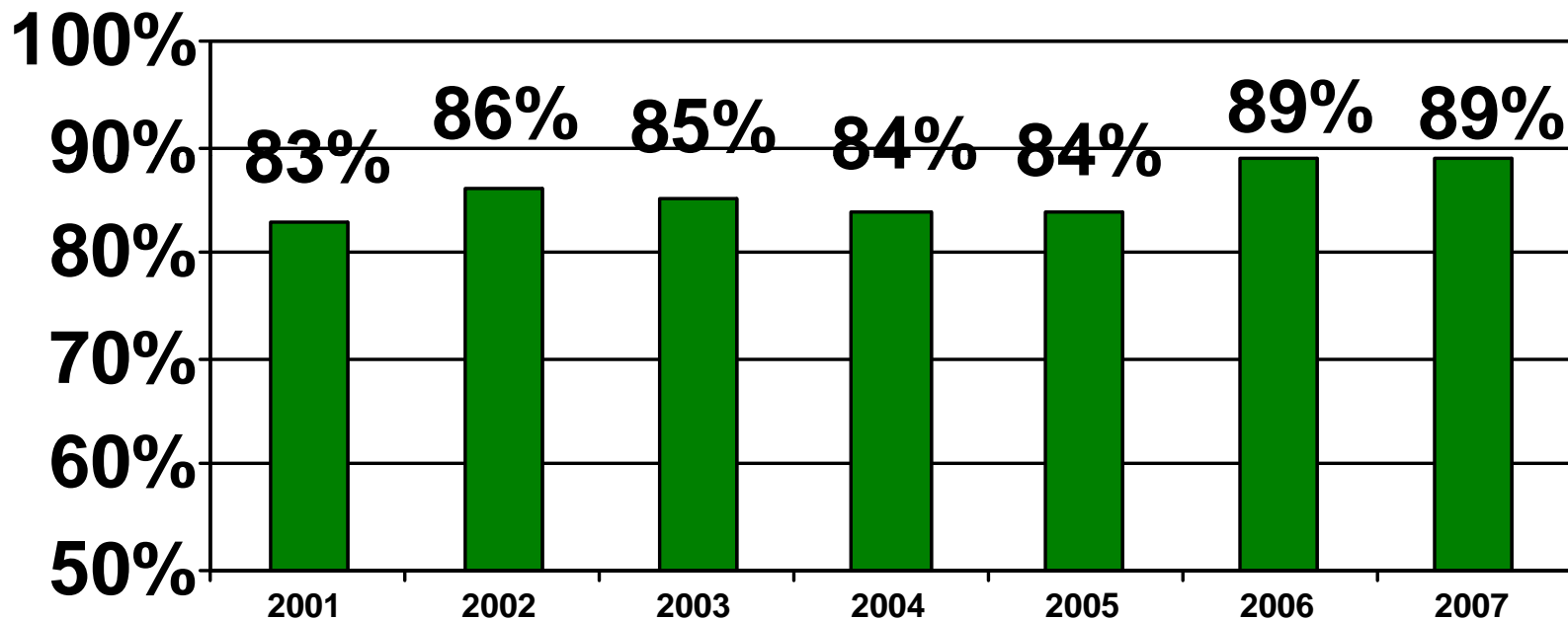


Where are airline contracts negotiated?



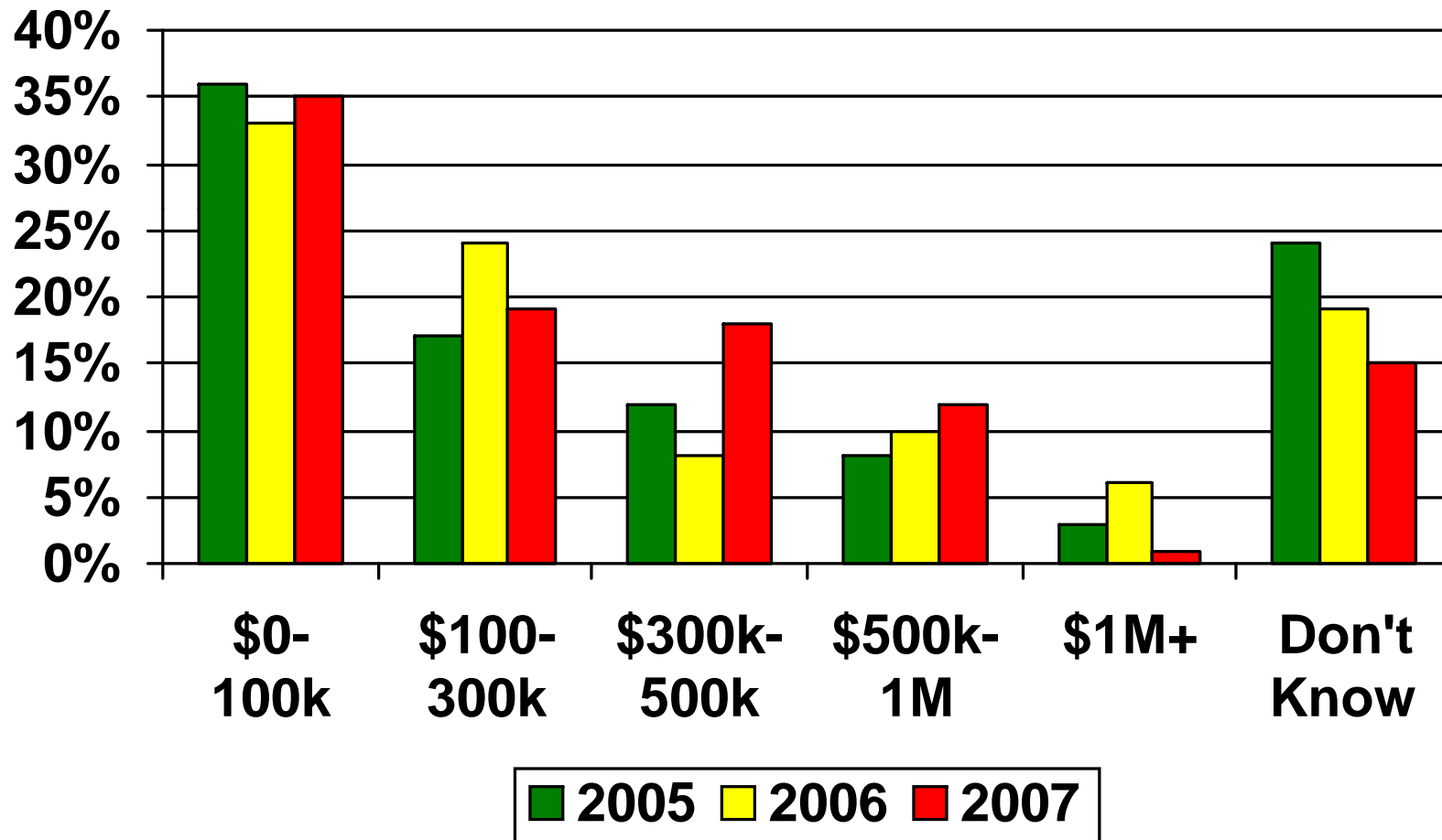


Institutions with Car Rental contracts



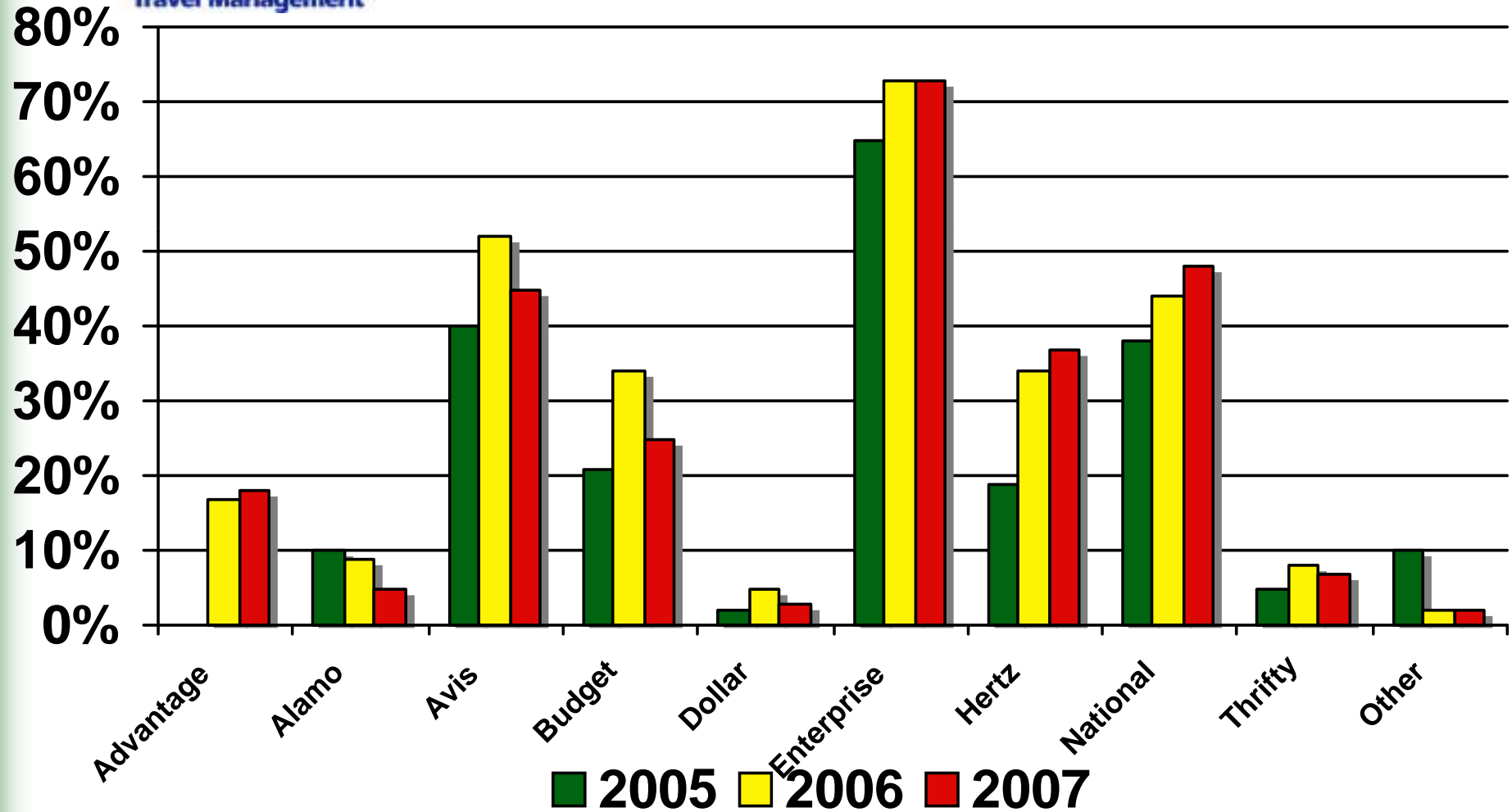


Car Rental \$ Volume



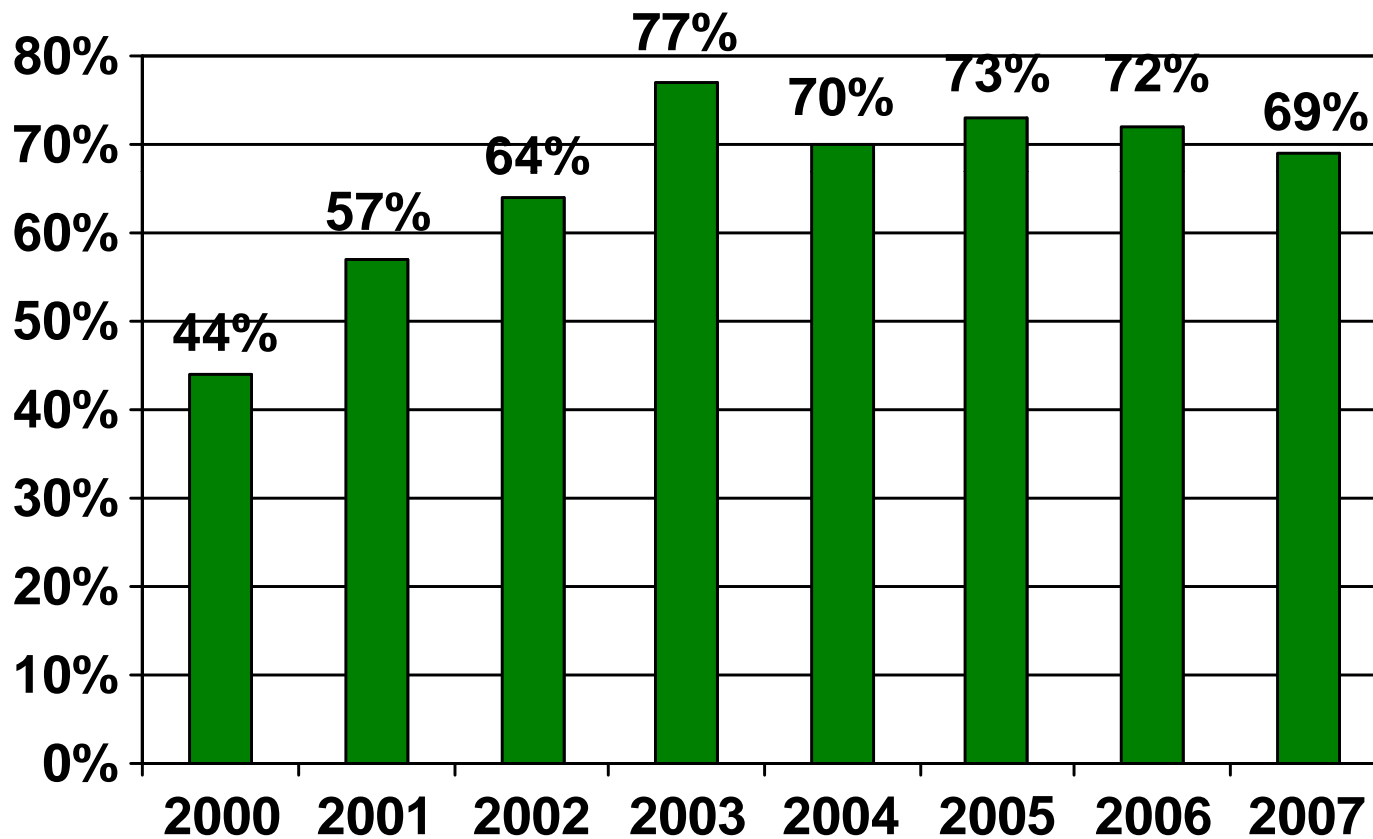


Car Rental Agreements



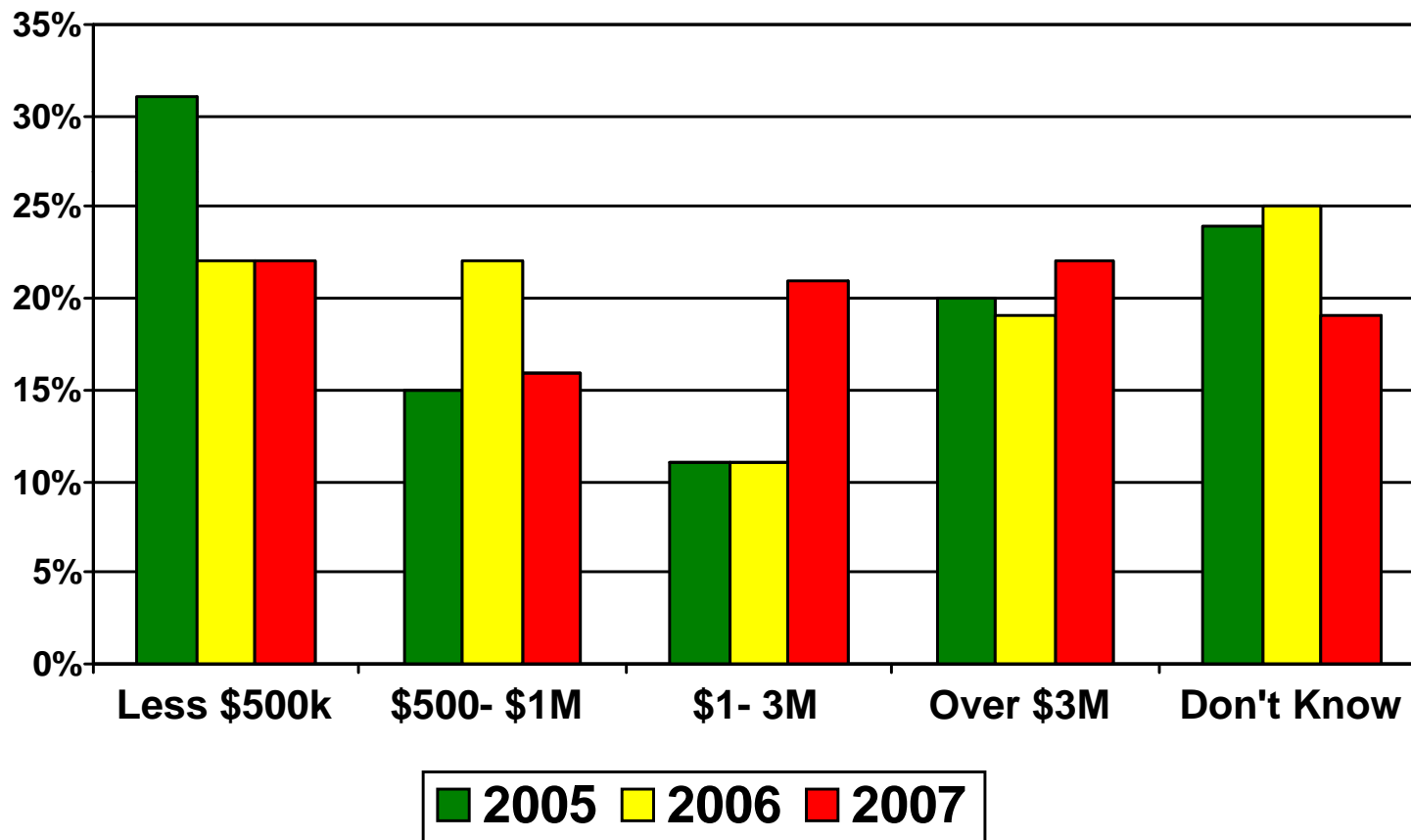


Local Hotel Agreements



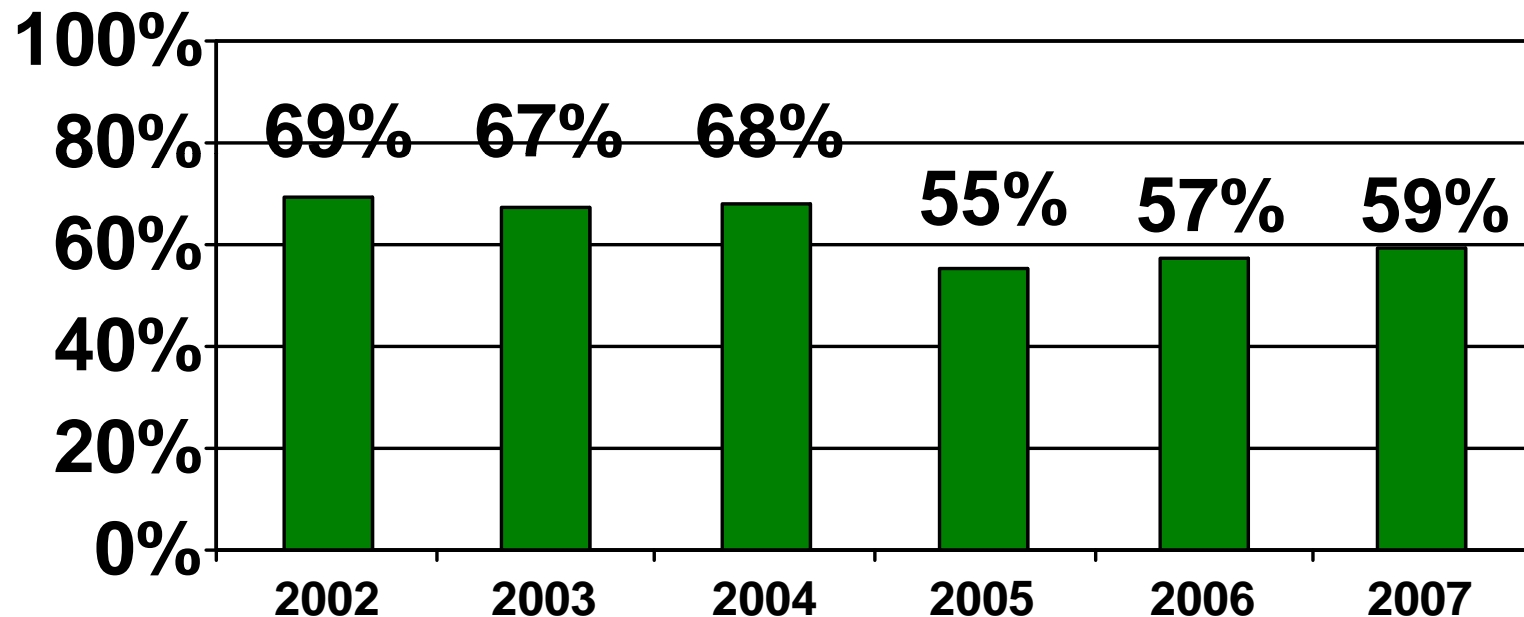


Hotel \$ Volume





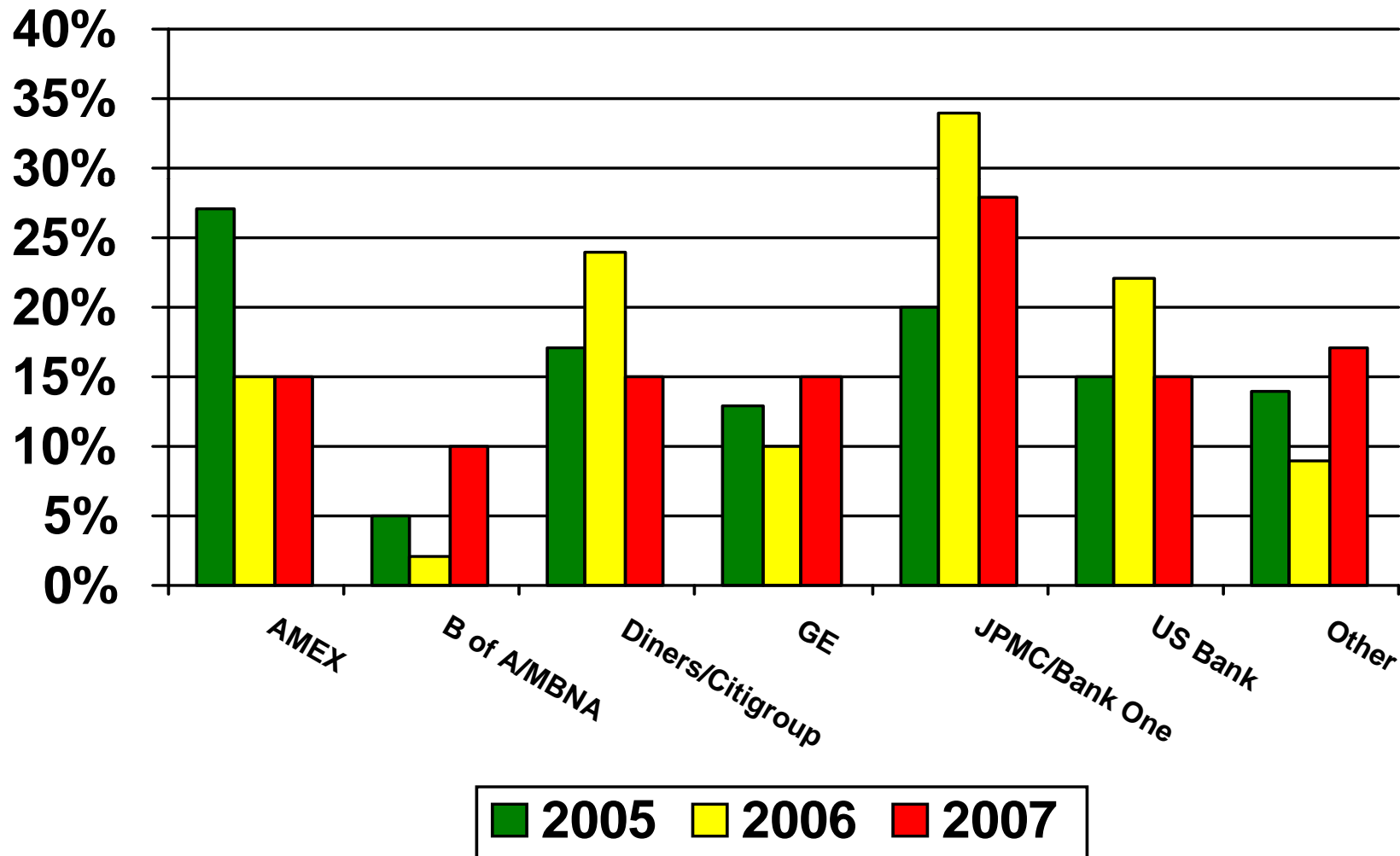
Survey Participants with Ghost Card Programs



- Unexplained drop in Ghost Card programs could be due to increased use of Procurement cards

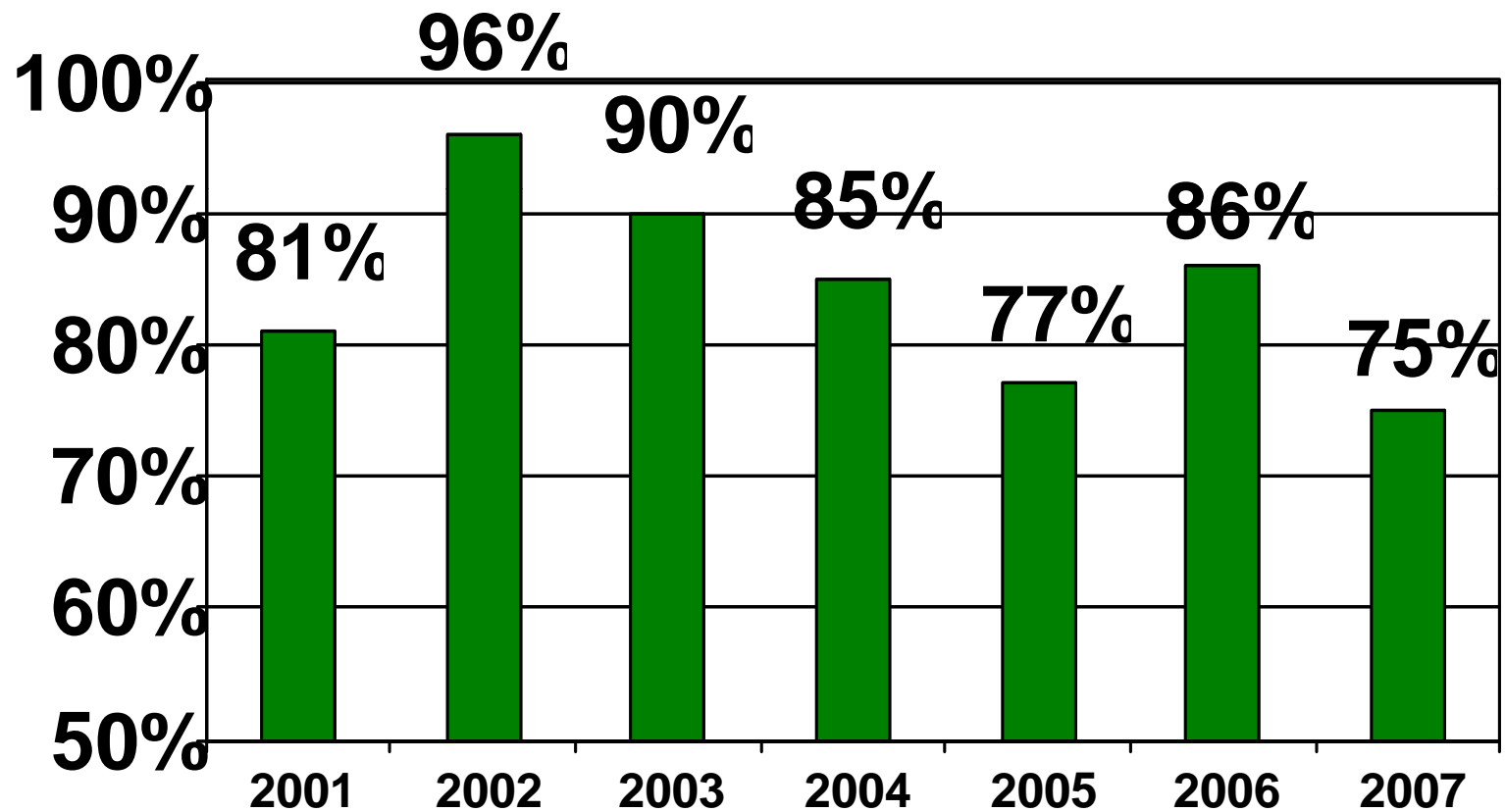


Ghost Card Companies



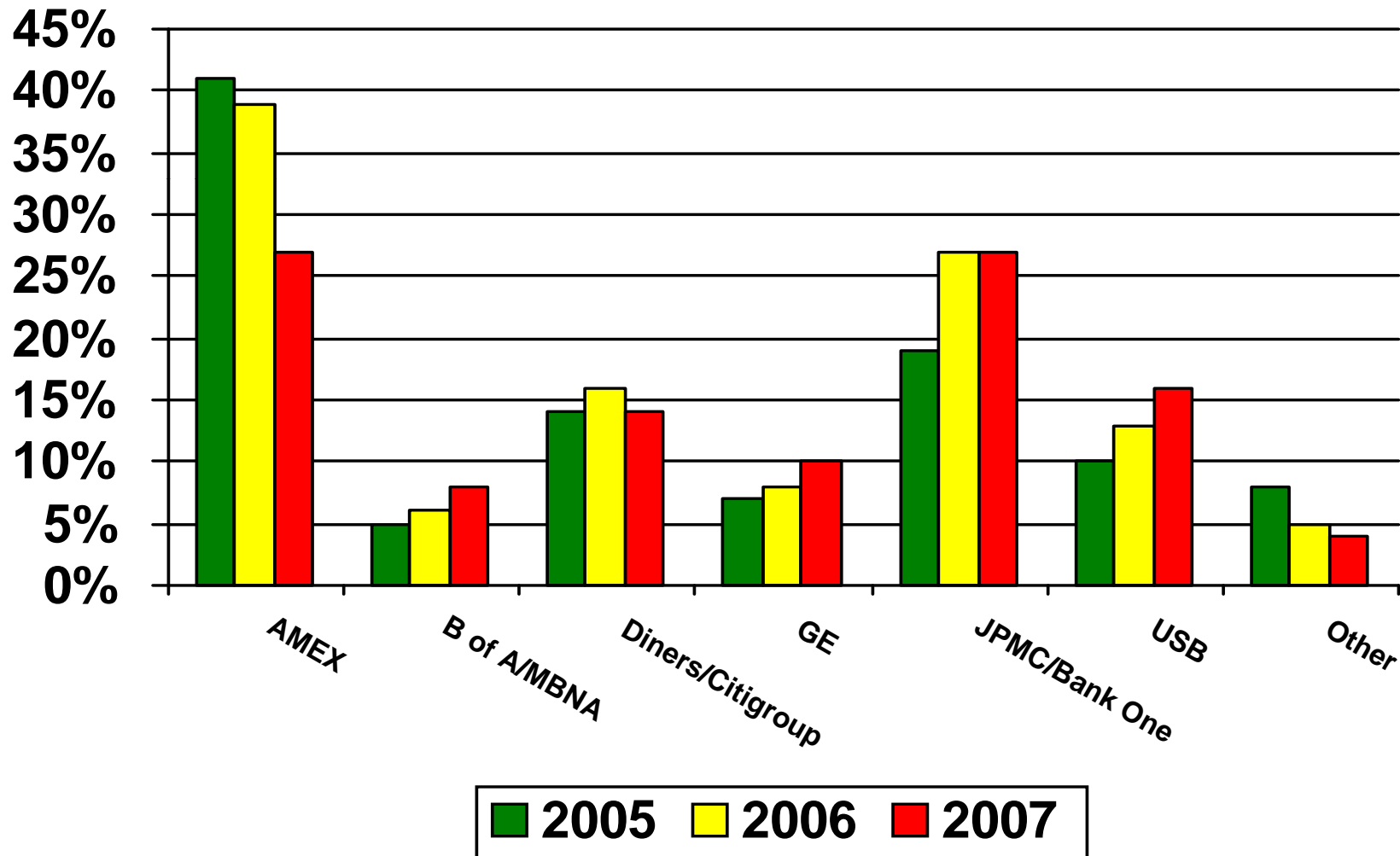


Survey Participants with Corporate Card Programs



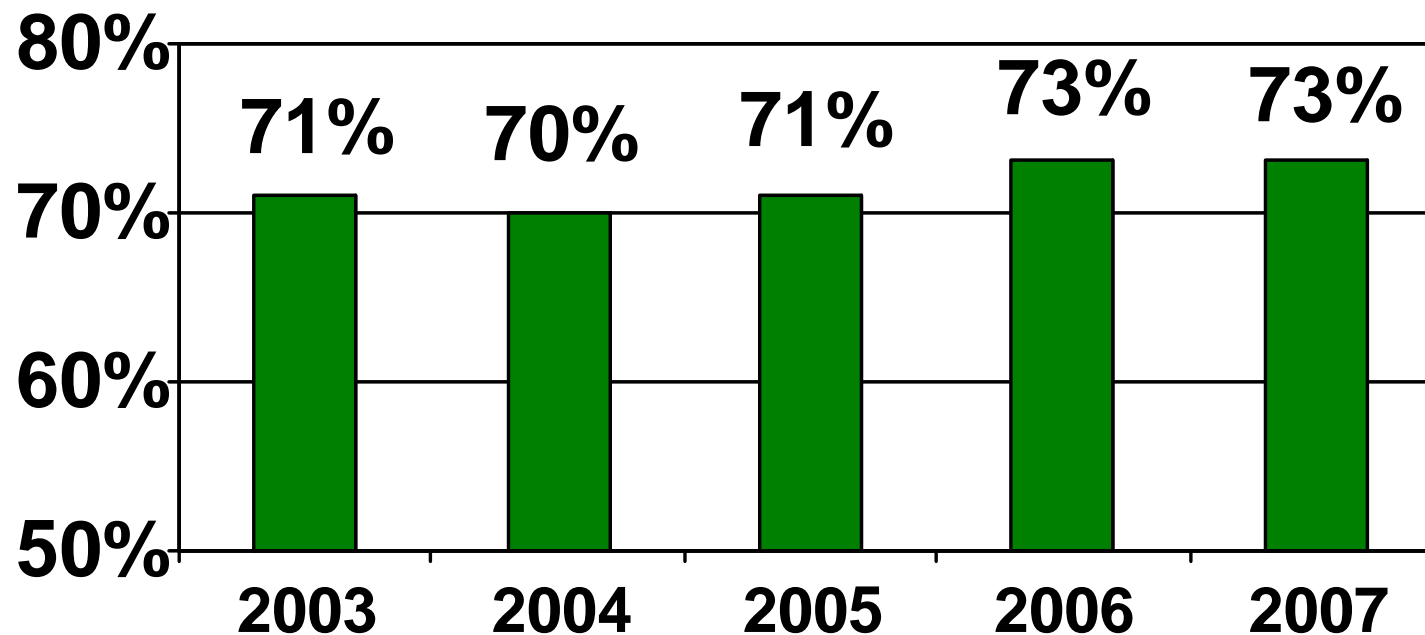


Corporate Card Companies





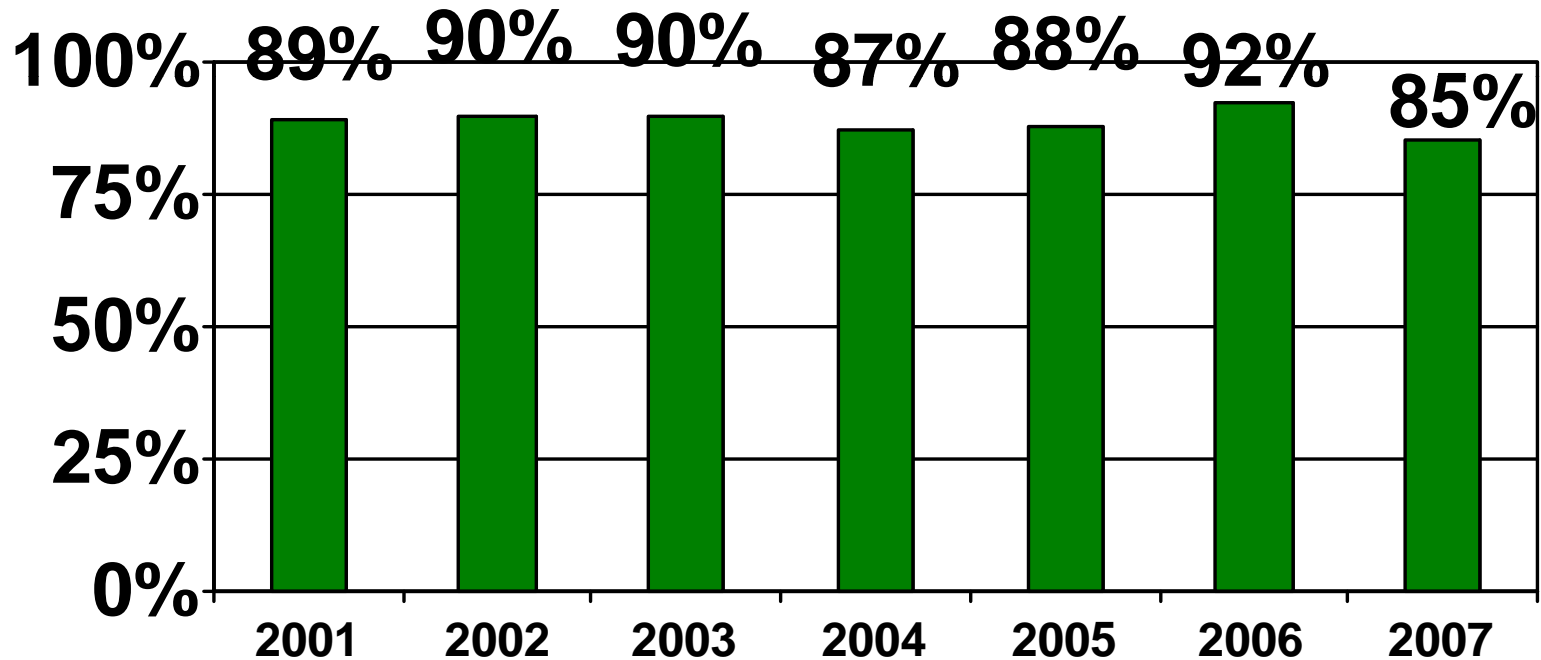
Corporate Card Programs with Individual Liability



- Majority individual liability rather than institutional liability

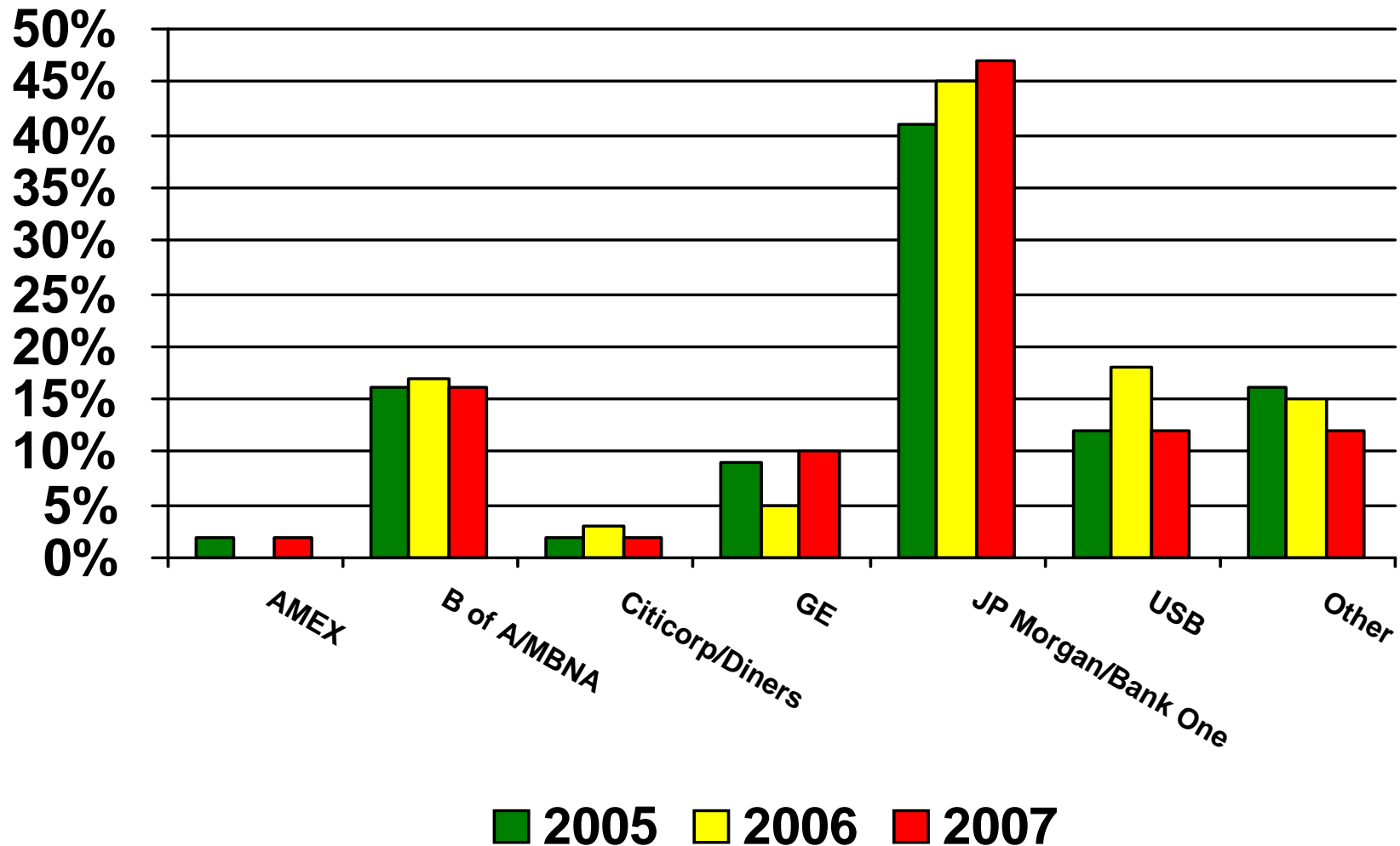


Survey Participants with Purchasing Cards



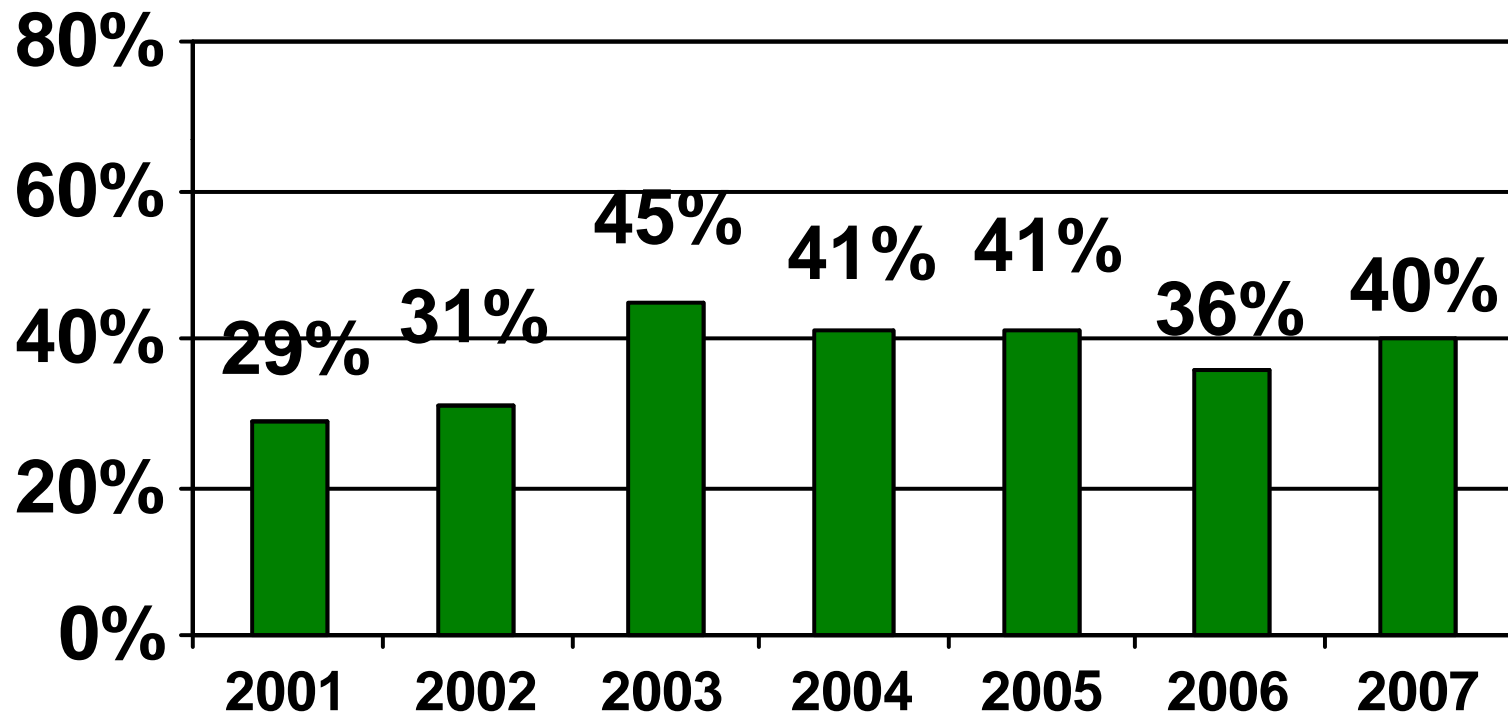


Purchasing Card Companies



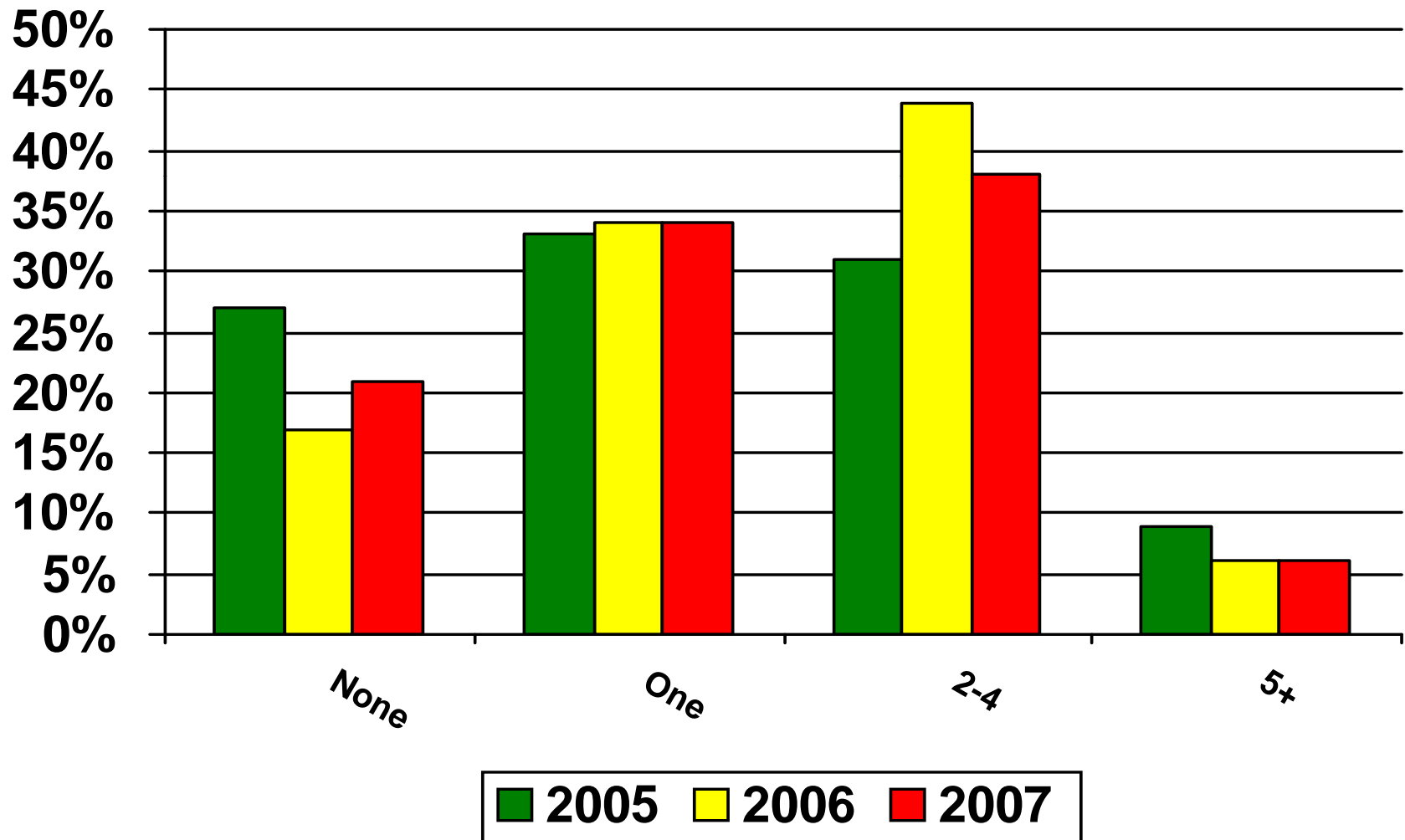


Is P-Card used for Travel?



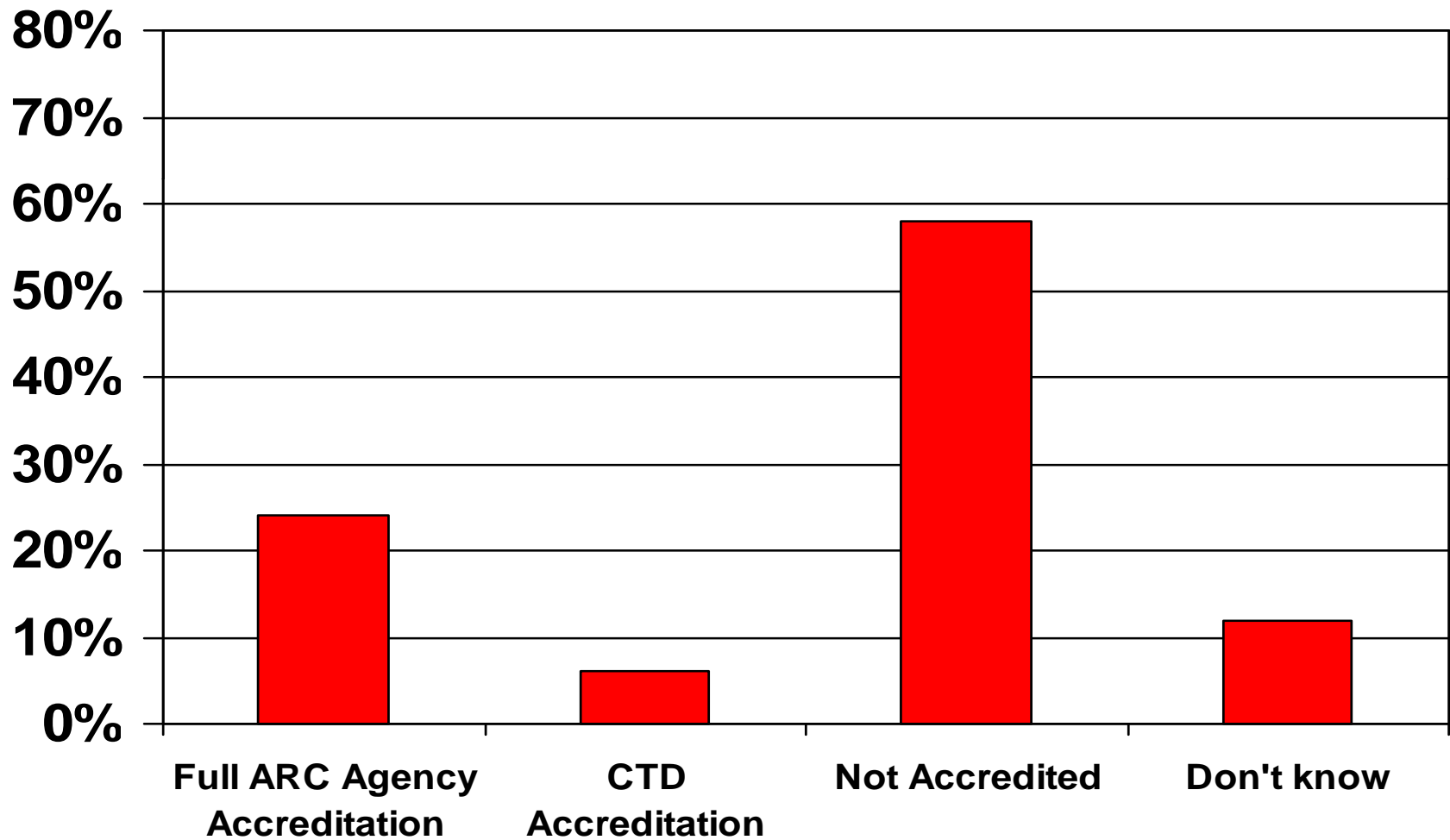


Number of Contracted Travel Agencies



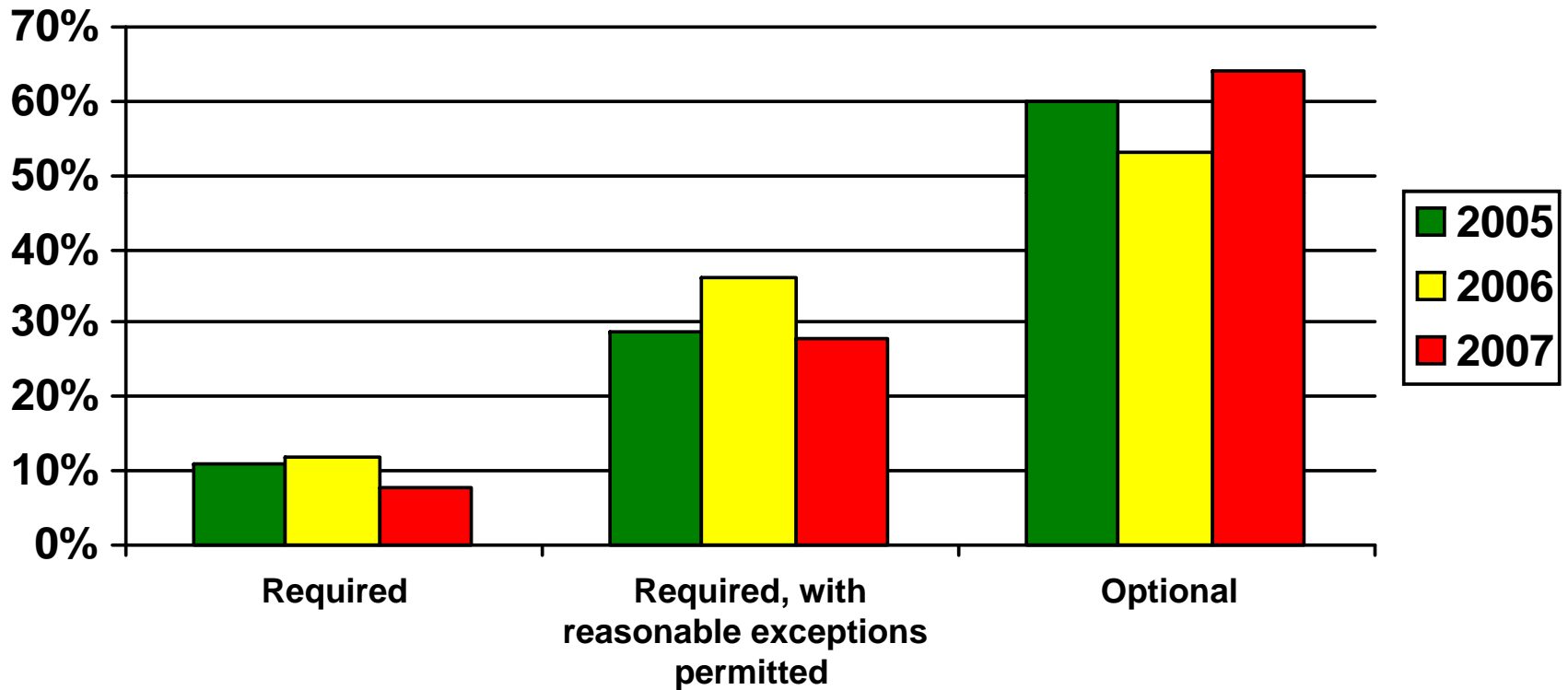


ARC/CTD Accreditation





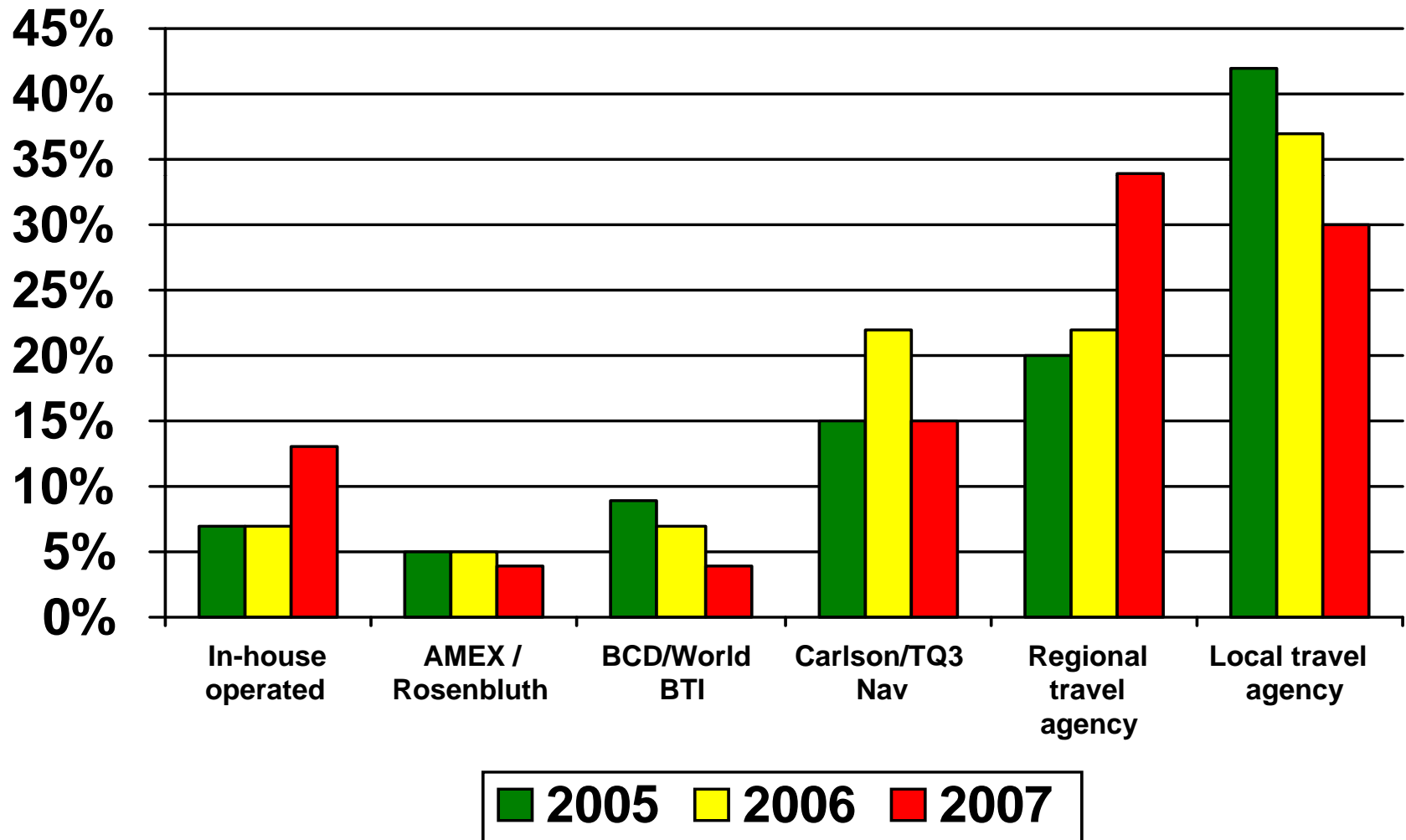
Is Use of Travel Agency Required?



- Policy on use of contracted travel agencies reflects the need for flexibility in academic travel management

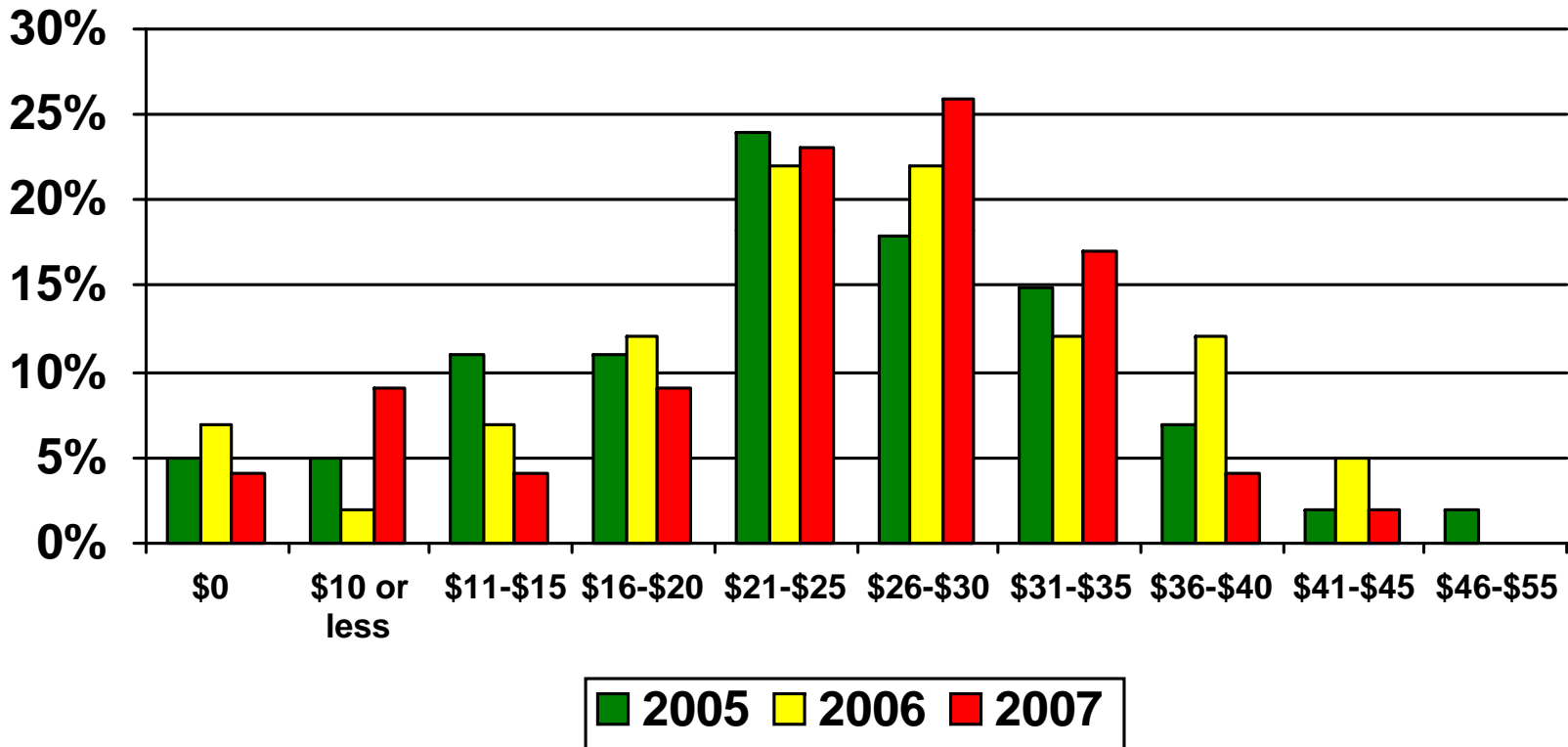


Travel Agencies Used by Survey Participants





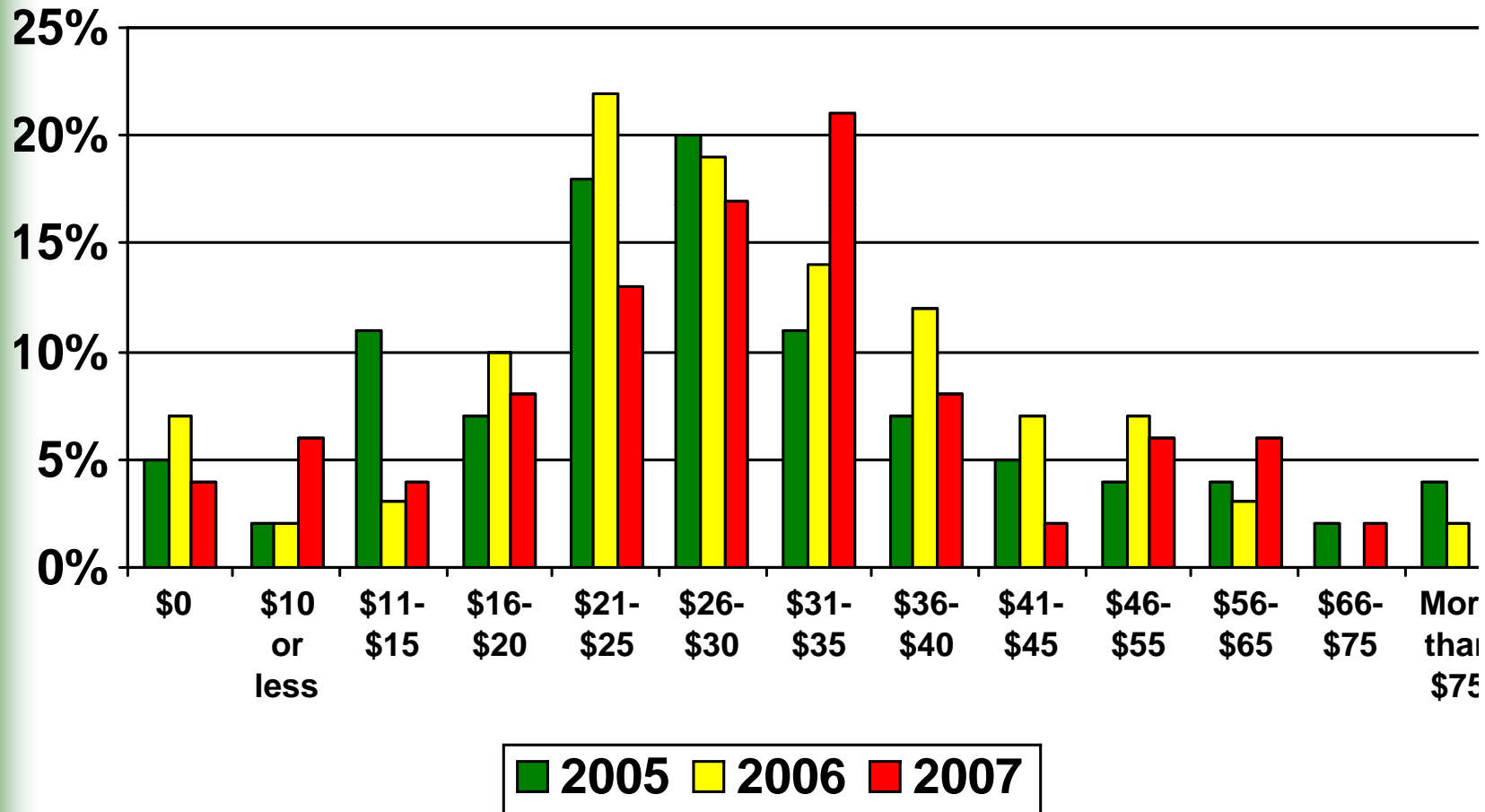
Domestic Service Fees



- Fees remaining constant with about half paying more than \$25



International Service Fees

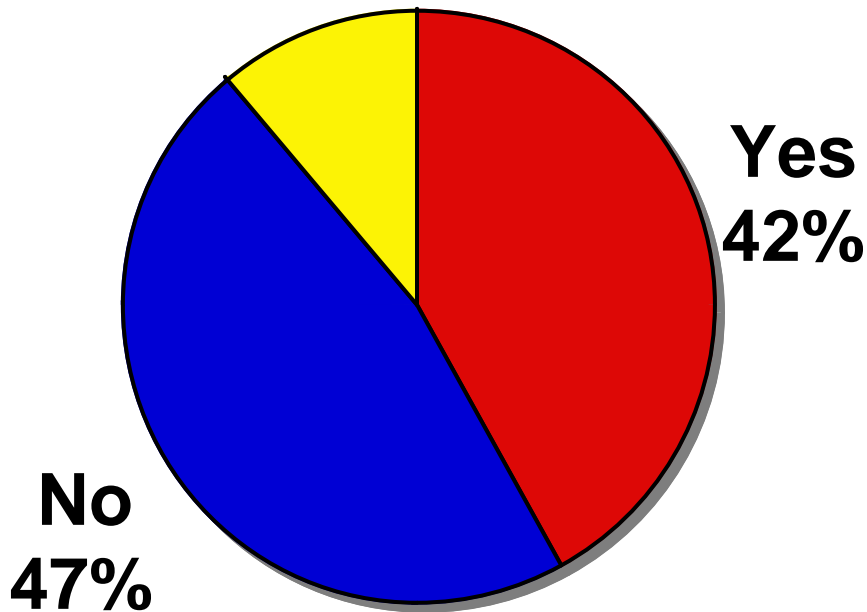


- Noticeable increase with half now paying more than \$30



GDS Related Service Fee Increase

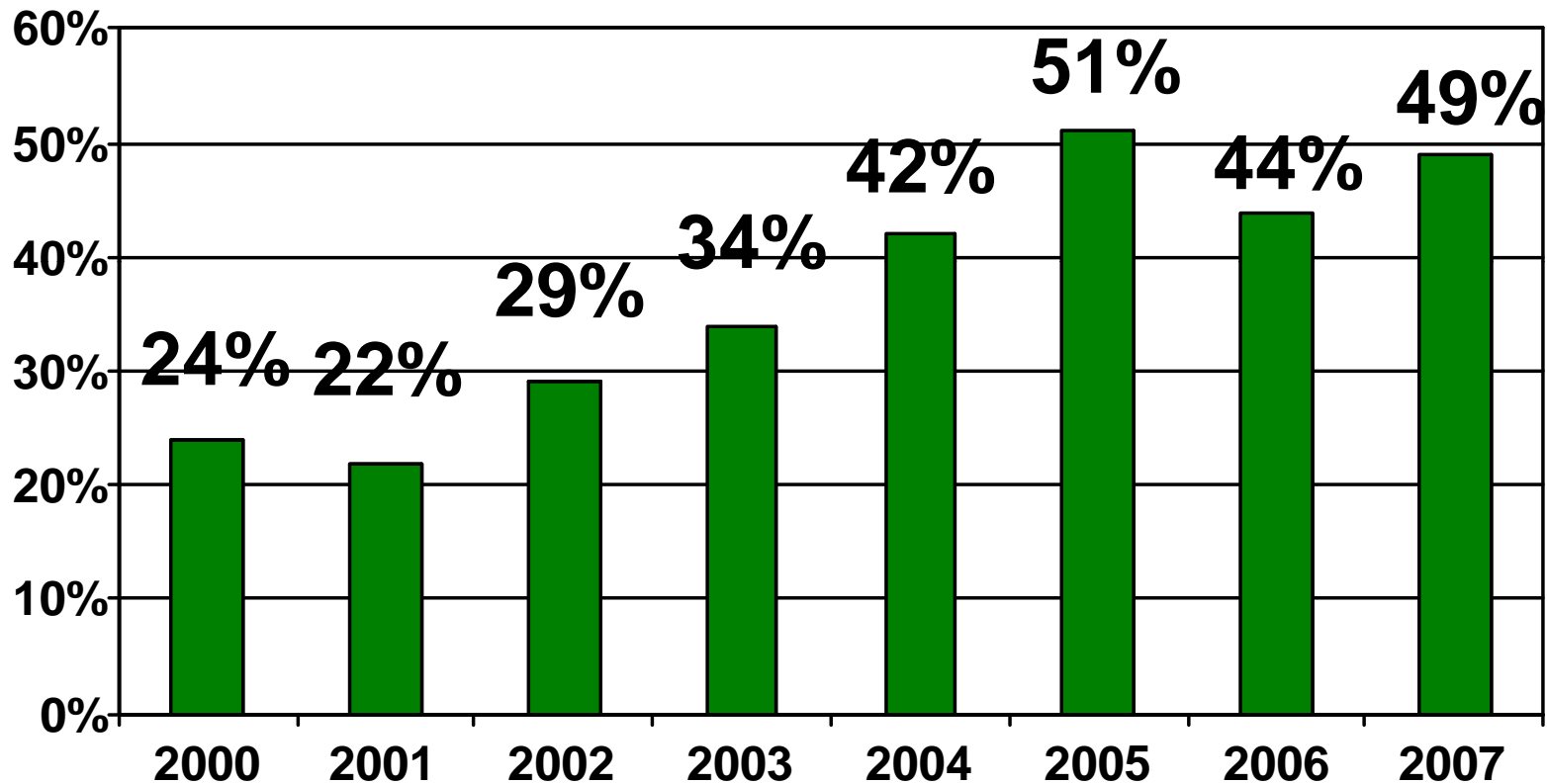
Don't know
11%



- Nearly one half of respondents were not subjected to service fee increases as a result of the new Global Distribution System cost structure



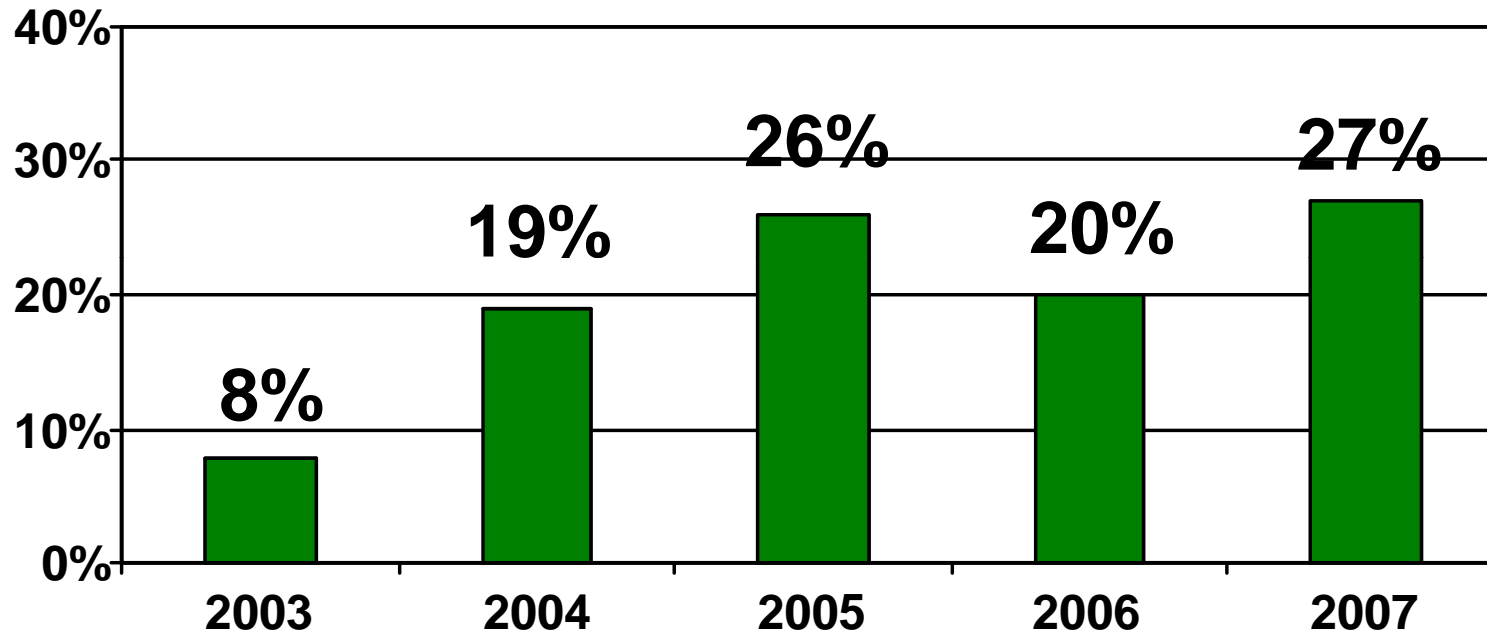
Survey Participants with Self-Booking Tools



- When asked the same question at the 2006 conference keynote address, the audience response was 48%, also a decrease over 2005, and a significantly different respondent pool.



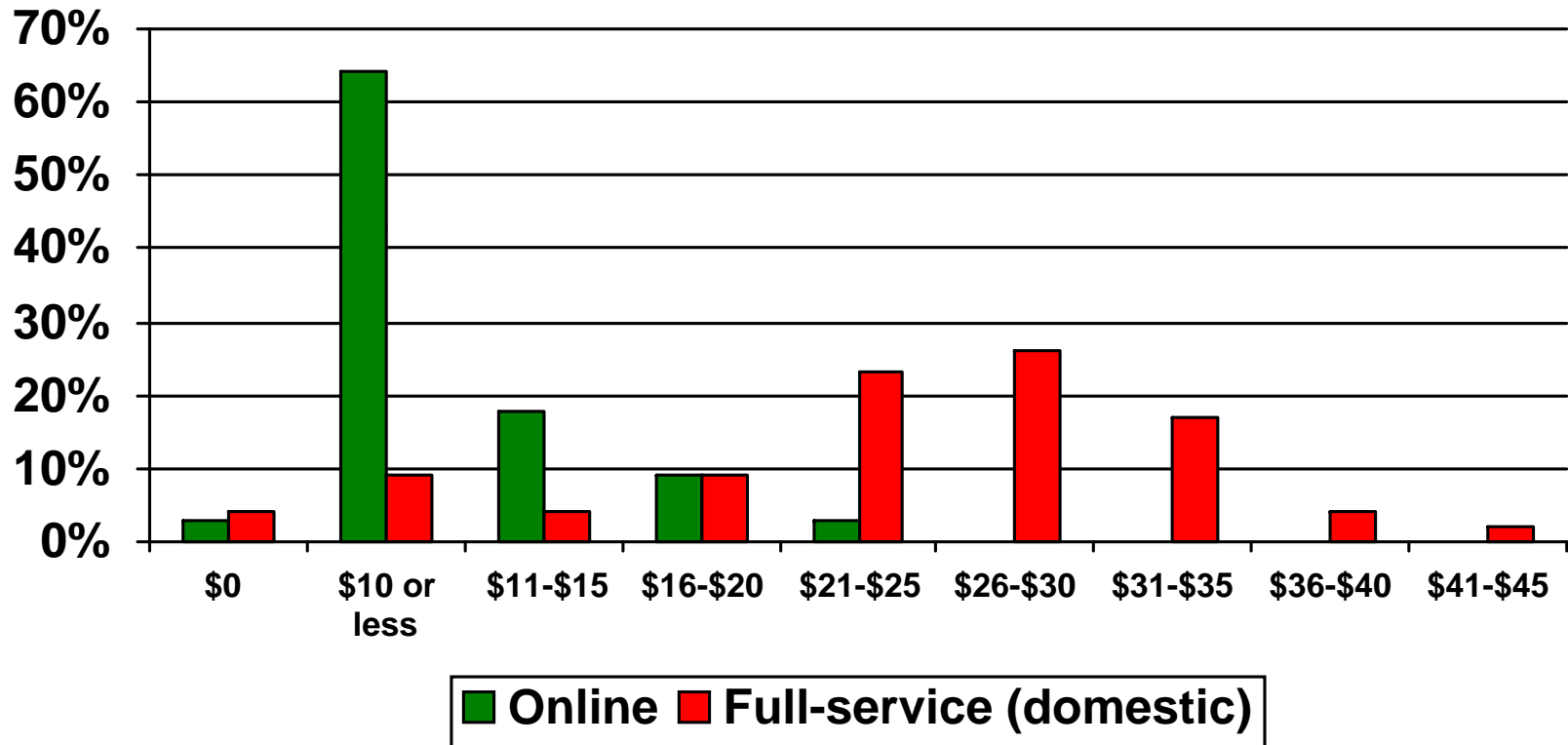
Self-Booking Adoption Rate



- Seven of 18 respondents had adoption rates of 30% or higher



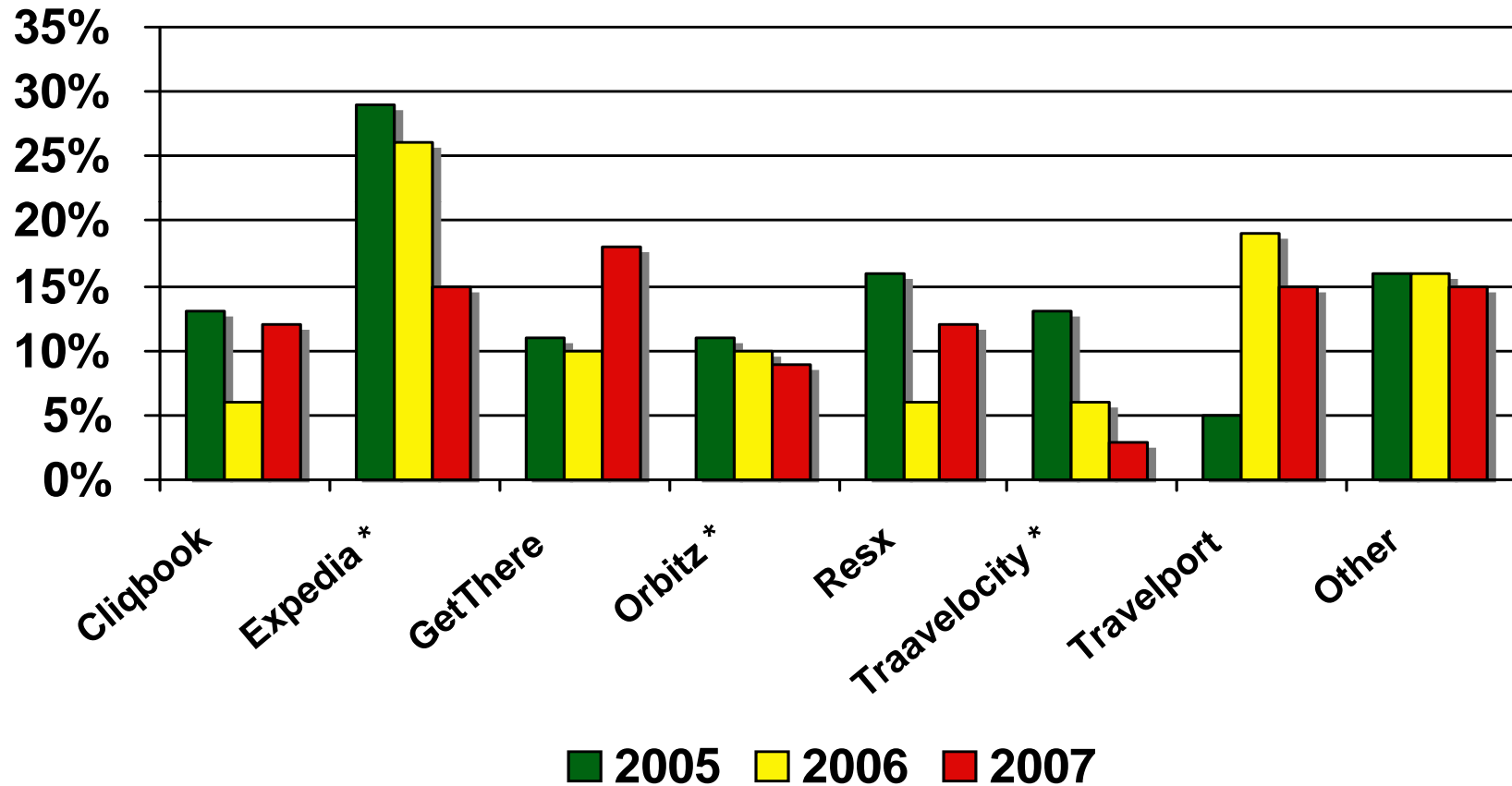
Online Booking Service Fees



- 67% are charging travelers a service fee of \$10 or less (84% in 2006)



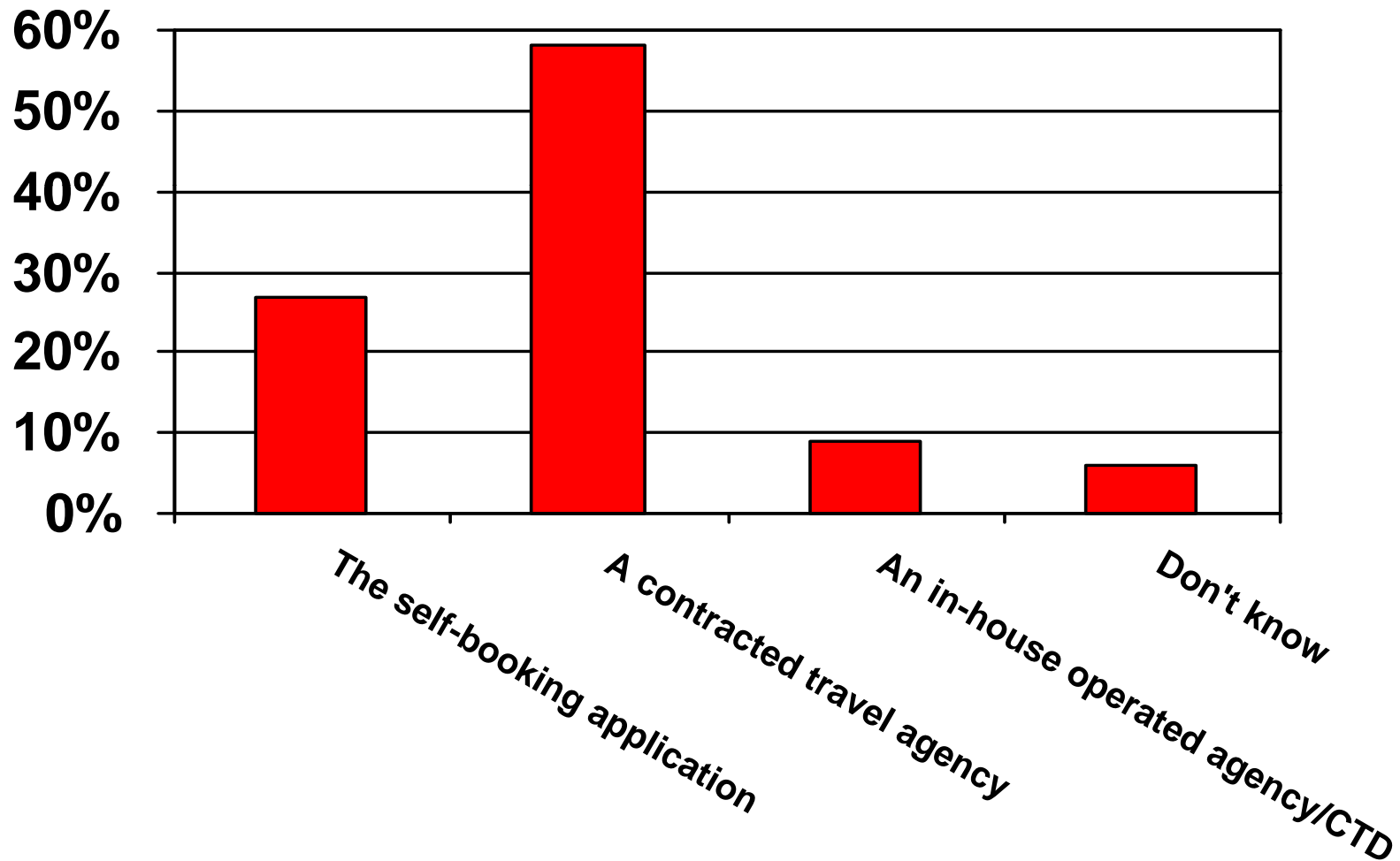
Top Self-Booking Tools



* OTAs are business versions

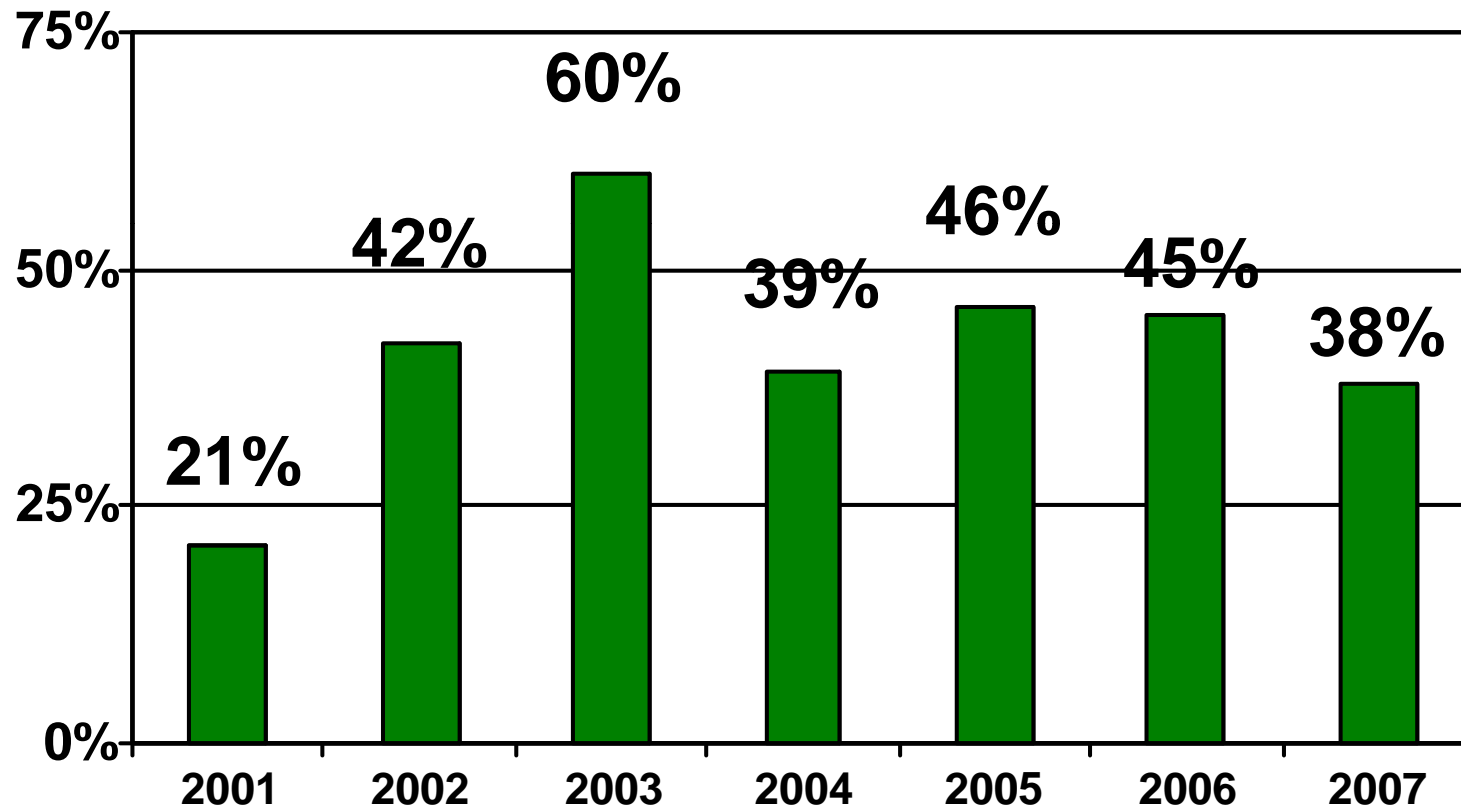


Online Booking Fulfillment



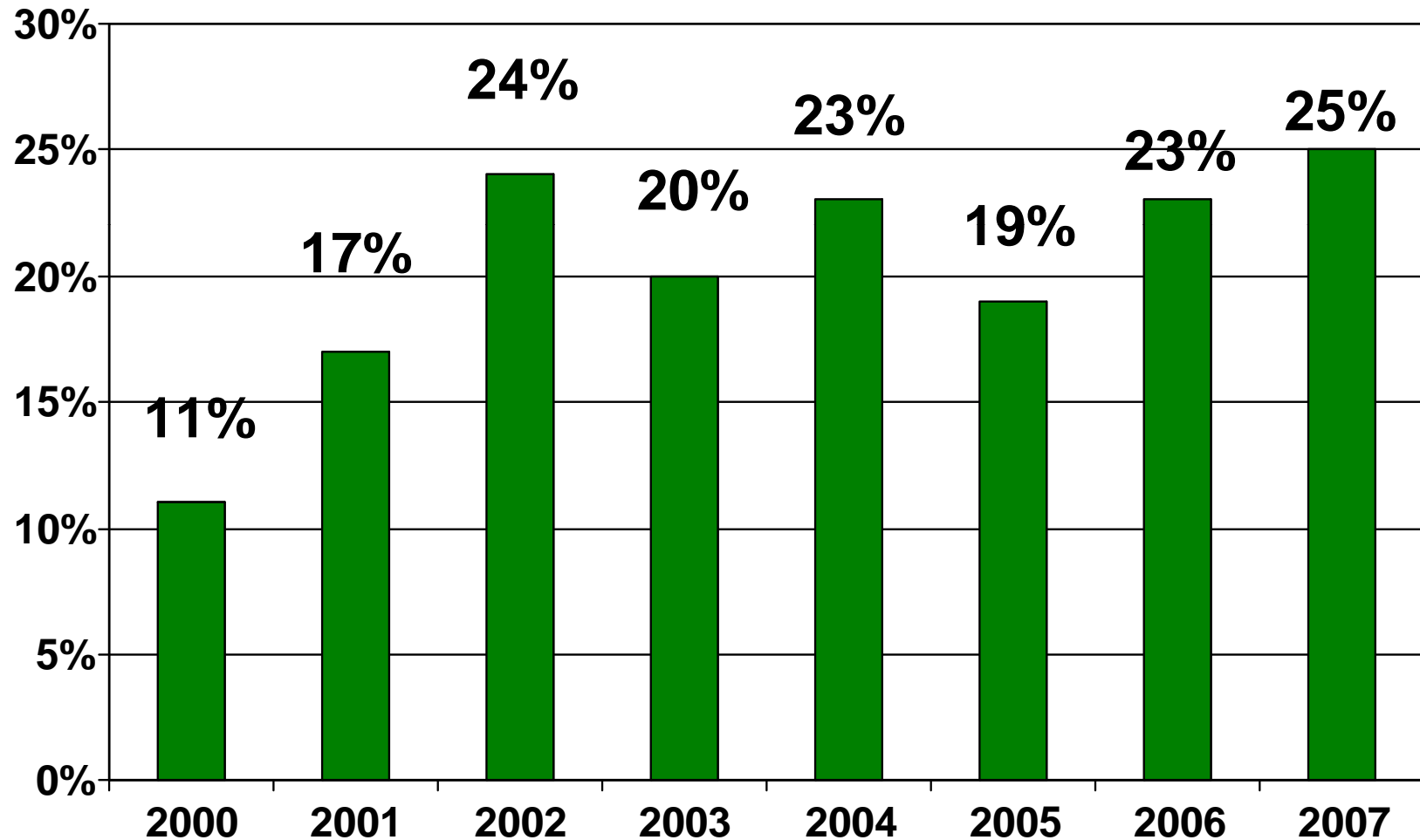


Planning an Online Booking Implementation Next Year?



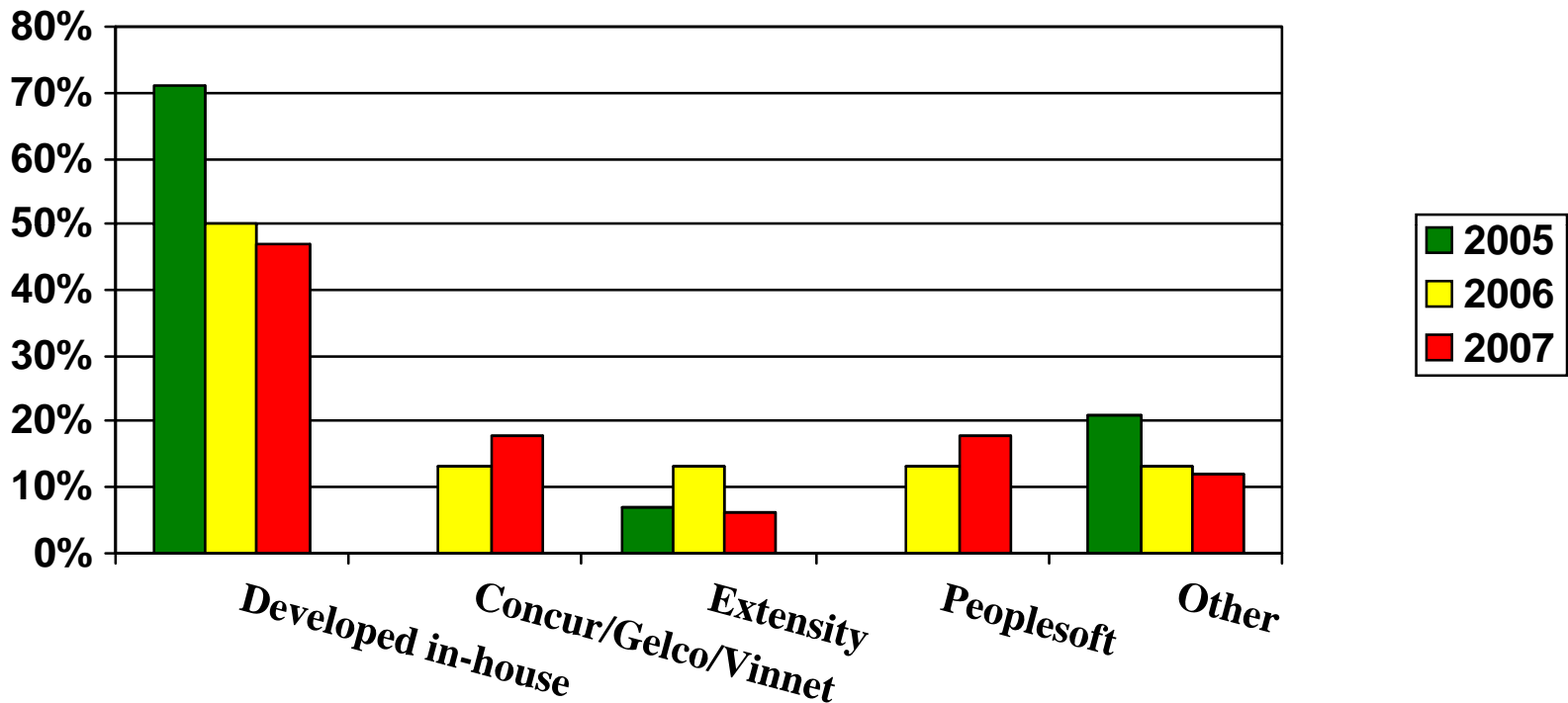


Survey Participants with Automated Expense Reports





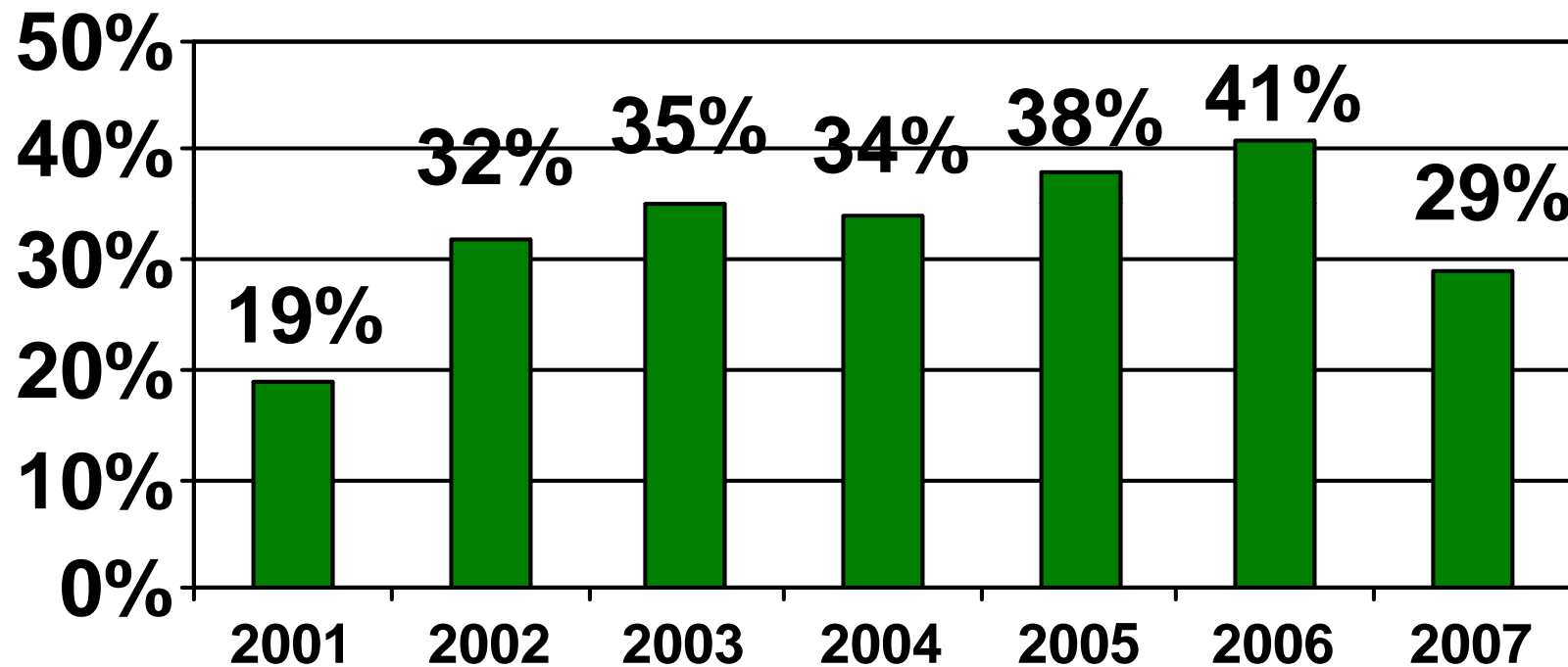
Expense Report Applications



- The predominance of internally developed applications highlights the unique needs of academia

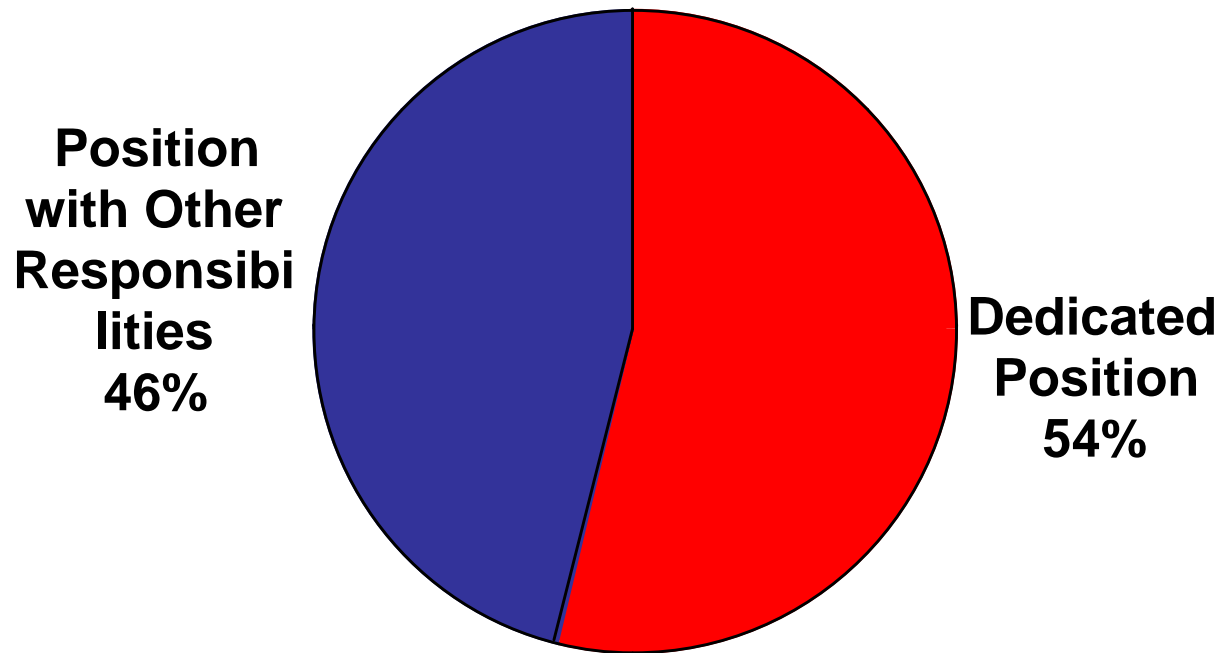


Planning to Begin Automated Expense Reporting Next Year?



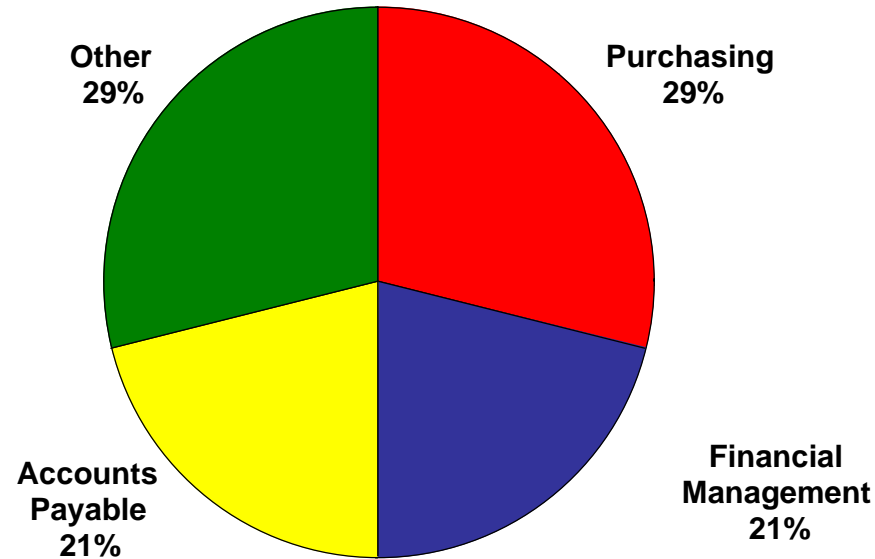


Travel Management Position



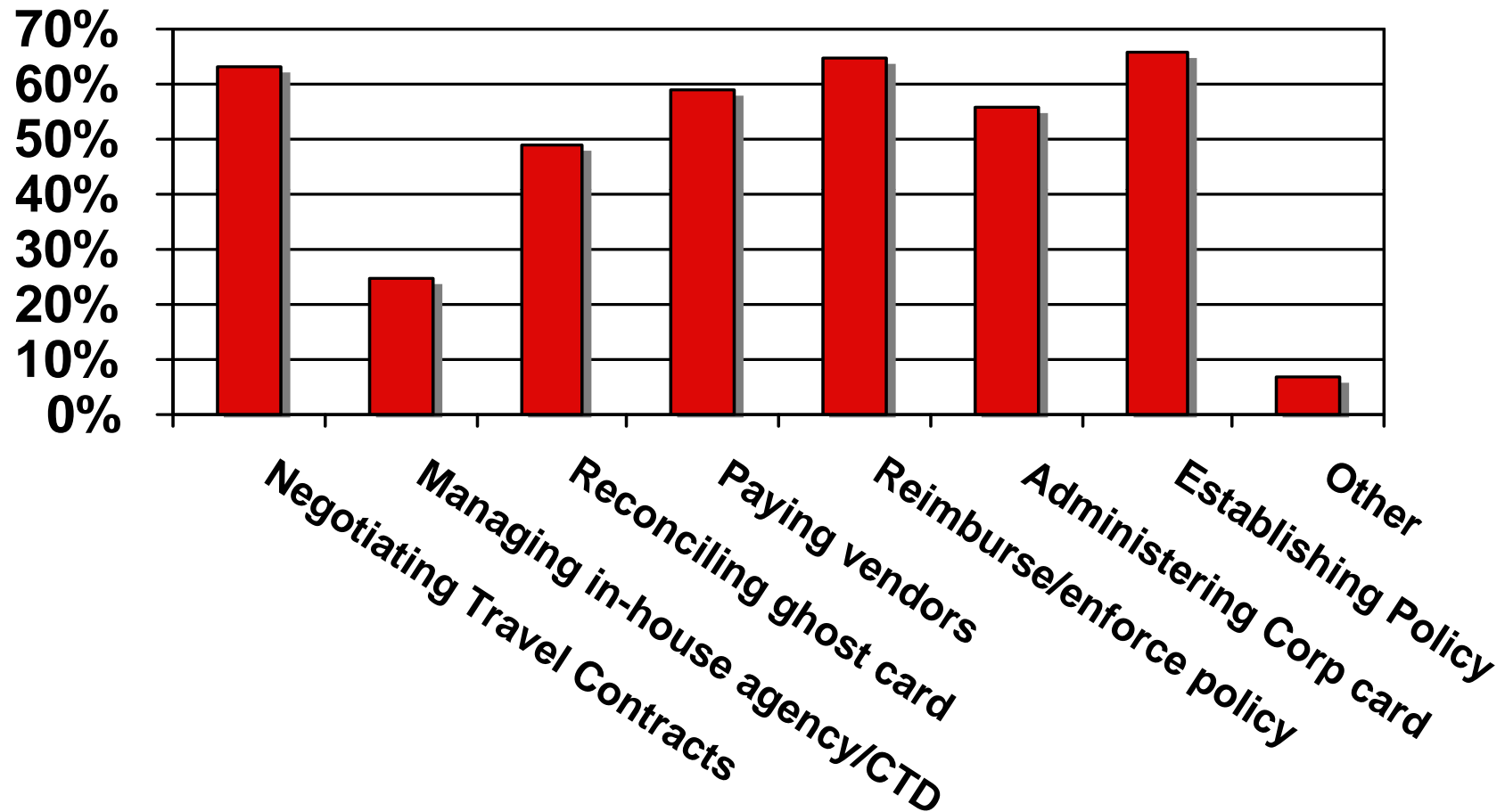


Travel Management Position Reporting



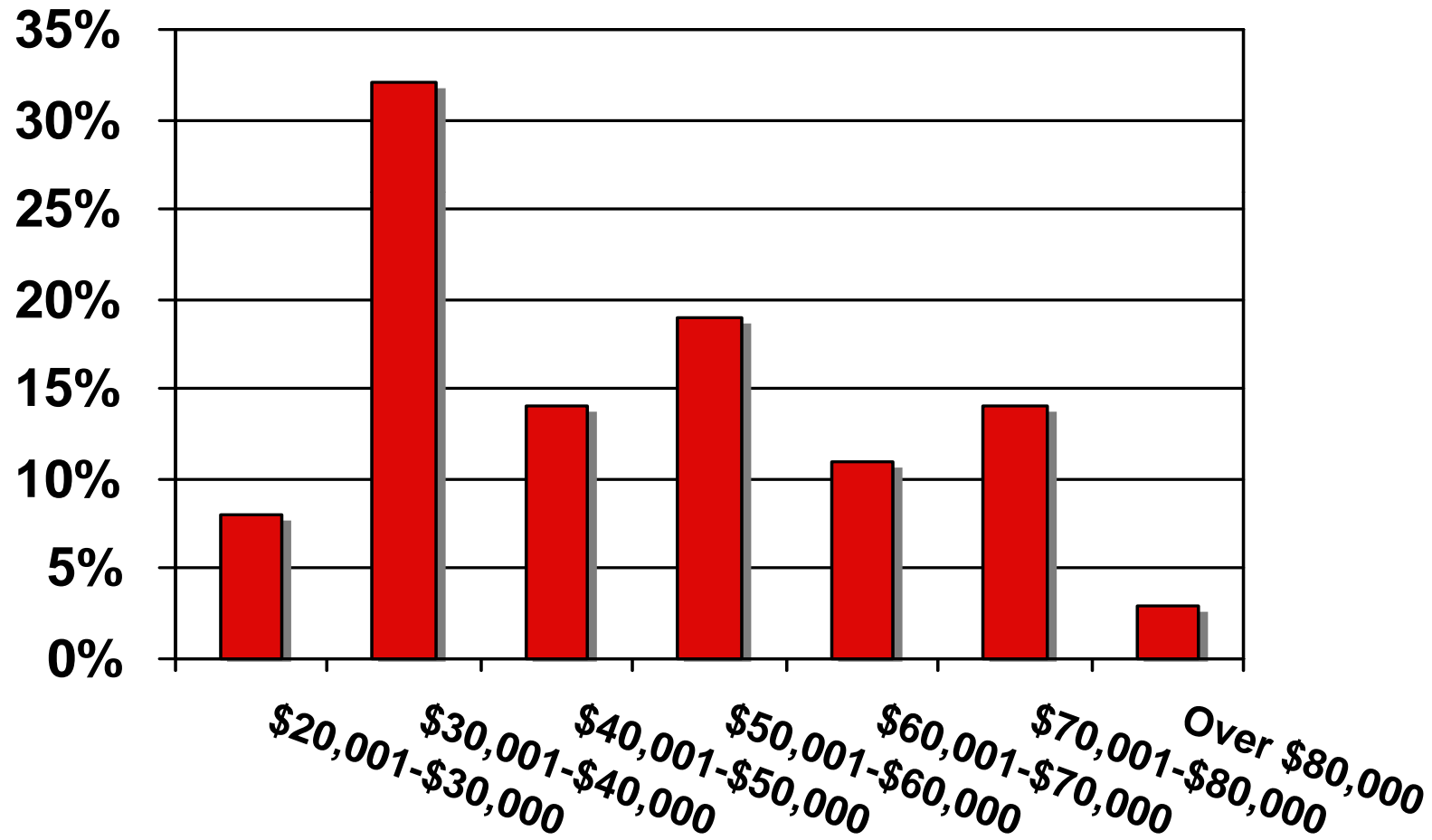


Travel Management Responsibilities





Travel Manager (dedicated position) salary range





Reason for not attending 2007 SCTM conference

- 17 of the 68 Survey Participants did not attend the 2007 SCTM conference

