



5 STEPS TO SUCCESSFUL OFF-SITE PROJECTS AND MEETINGS: A TRAVEL MANAGER'S GUIDE

THE STATE OF PLAY IN TRAVEL MANAGEMENT

If you're a seasoned travel manager, you'll have seen the industry change significantly, but never more so than in the last few years. The signs all point to the continued recovery of the workforce travel industry following the slump of the past three years, with stats showing that 64% of business travel managers expect their travel booking activity to increase this year.

This sees us on track for a 'total' recovery of the sector by 2026 as predicted by the Global Business Travel Association's 2022 Business Travel Index Outlook.

Yet while the overall landscape looks positive, the day-to-day role of a travel manager has never been harder to navigate.

Our 2023 survey of 100 travel managers across 24 sectors found that 31 per cent saw hotel prices as their biggest challenge, while 27 per cent expected the availability of accommodation to be a potential headache, especially for long stays.

That's not all.

We are in the midst of a generational change of attitudes, and travel managers have a crucial role to play in what travel of the future looks like for events and travel. This means considerations on everything from climate impact to general sustainability, and how to put demands on suppliers to move the needle on these key issues.

KEY CHALLENGES FOR TRAVEL MANAGERS IN 2023

RISING COSTS

While many businesses are retaining their travel spend, due to persistently high inflation and increased staffing costs overall costs are up in all areas of business travel.

Figures from the first two months of 2023 showed average daily rates of occupied rooms increased from £121.74 to £128.94 in the UK and from £185.43 to £196.26 in London- a 13% increase from 2022¹. The cost of a business trip to London has risen by 15 per cent over the past year, with the average price of hotel rooms increasing by 20 per cent per night in the city.² even for day rates for events, meetings and conferences, this can have an impact.

SUSTAINABILITY IS NOW A TOP CONCERN

It is not uncommon for employees to ask a travel manager questions about travel that were unheard of years ago. This could be on the transparency on carbon emissions, how sustainable the trip is, or what is being done to offset the travel, or even if the travel is needed.

Purposeful travel is a hot topic that covers a broad range of areas from accessibility, DEI, carbon offsetting and beyond - even down to how venues handle data security.³ This means for the travel manager who has never had to deal with these top-of-mind issues, a changing RFP or scope is required to analyse how venues stack up.

BUSINESS TRAVEL IS BEING ANALYSED BY EVERY DEPARTMENT

It's never been so easy for anyone to access consumer booking sites and compare travel costs, but this can lead to disconnect within the business when travel is booked for groups and long stays. While some (usually the travellers themselves) will seek luxury and/or convenience, others (often Financial Directors) will value the lower end of a cost per night / cost per room. This means travel managers are having to balance multiple expectations for multiple events, projects and meetings with the usual needs which feel ever more varied - from dietary requirements to parking needs and flexible check-in times.

DISRUPTIONS CONTINUE TO AFFECT BUSINESS TRAVEL

Supply chain issues, air travel changes, the impact of Brexit, environmental campaigns, strike activity and even seasonal illness all mean that for travel managers, having a robust cancellation policy that is easily understood and accessed has never been so important. For many travel managers, it may feel like getting all attendees into one event space on a budget and on time is now the exception rather than the norm! For those managing extended stays, this can be a concern. Projects are more likely to suffer scope creep and extensions, and as such, travel managers need to be adaptable.



TIP

Roomex's Forward Pricing Report helps travel managers stay up-to-date on the latest forecasts for hotel rates across the UK and Ireland. This quarterly publication helps workforce travellers stay ahead of the curve when it comes to hotel booking costs.

Check out the latest report [here!](#)

Comparing hotel rates across countless suppliers, keeping track of bookings, contacting hotels to change reservations... that's not to mention the time and effort it takes to collect receipts, reconcile expenses and reimburse travellers and ensure the right safeguarding in place for all team members. It's a big job.

In this guide, we'll share 5 steps to successful off-site projects and meetings amidst this new landscape.

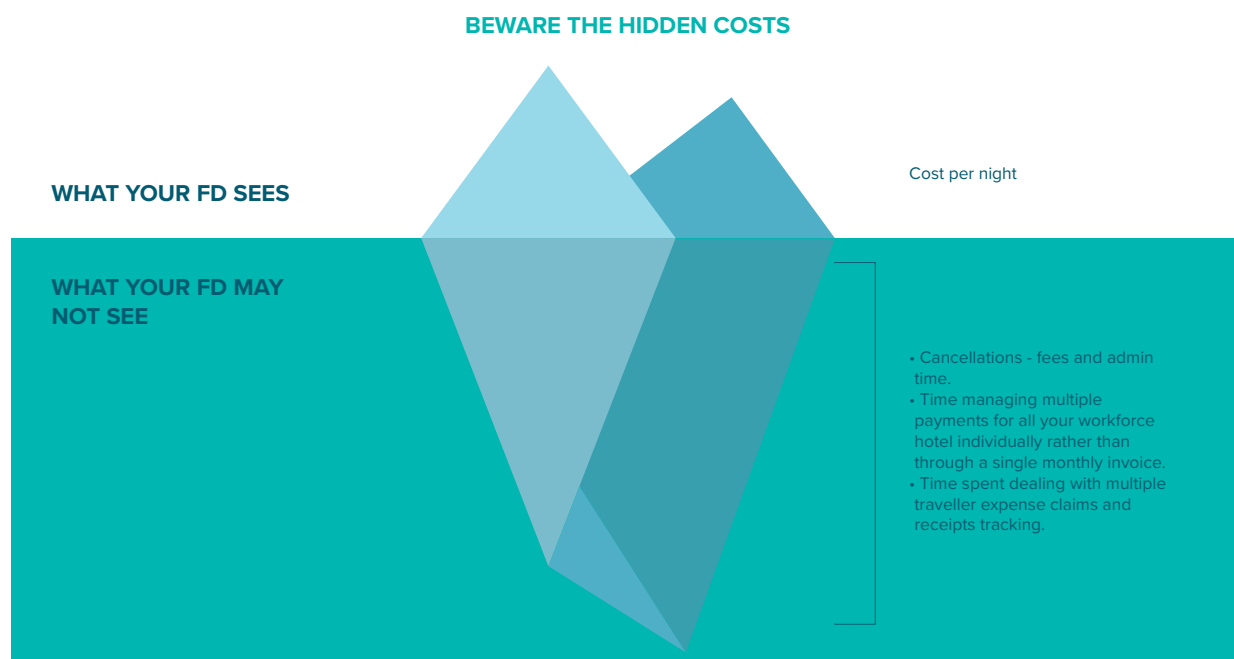


STEP 1: HELP SENIOR TEAMS OVERCOME 'COST-PER-NIGHT' THINKING

As a travel manager, it's easy to feel that you sit in an awkward space between the board or the FD and the teams you serve, in order to reach the perfect middle ground on offsite project and meeting venue bookings.

Venues for conventions, events, long-stay crew projects and meetings all have a role to play in moving the business forward, but there can be a disconnect between teams on what the booking requirements should be - and it can be hard when it feels it always comes back to cost, leaving you looking like you aren't listening to your teams - or that you aren't respecting the budget.

Overcoming the 'finance vs the rest of us' disconnect



It can be helpful to share the whole range of facts with your business teams. While the cost per night or room seems the most pressing factor at the offset, there are other factors team members may not have considered,

Some concepts we share with potential customers to highlight to the board are often around the hidden time sink -admin costs such as:

- The effect of cancellations - both hotel fees and admin costs.
- The admin costs of managing multiple payments for all your workforce hotel individually, rather than through a single monthly invoice.

- The time drain of dealing with multiple traveller expense claims and receipts tracking.
- The cost of rebooking when a venue doesn't meet expectations.
- The cost of assessing properties for suitability.
- The legalities around safety assessments and the trust you can place in the venue.

It can be helpful to show how you weight up each venue for its suitability, and document this with an official matrix, or showcase your travel management platform and how it does it all for you.



We recommend travel managers undertake a series of fact-finding missions within the C-Suite and with travellers to ascertain what a great venue looks like for all parties and stakeholders. This can then lead to the production of a decision matrix, a quantitative method that can remove emotion to help you narrow down options without getting stuck in the same old arguments. You ensure every booking is perfect for the objectives of your business and that's understood across the board.

- Karen Johnston

Director - Projects & Meetings

(Unlike a simple list of pros and cons, a decision matrix allows you to place a relative value on each factor and weigh them accordingly. You can find many templates online.)

It can also be helpful to share stats about how important successful meetings, projects and events are. Make sure you are heard!

Points to share

- It can help to bring attention to safety concerns. For crew members, consider the stories of flight attendees who have special ways to lock their rooms recently shown in the UK media after attempted break-ins. It can be helpful to share the realities of 'cheap travel'.⁴
- Not everything is best done virtually. According to a recent HubSpot survey, almost 100% of the people questioned said face-to-face meetings are essential for long-term business relationships.⁵
- A Forbes survey revealed that 84 per cent of people say they prefer in-person meetings for their ability to build stronger and more meaningful business business relationships.⁶

- The same report revealed many executives express concern that attendees do not give their full attention to virtual meetings. In fact, 58% admitted that they “frequently” surf the web, check their email, read unrelated materials, and handle other ancillary work during digital meetings.
- Event spending is predicted to rise by 83% in 2023 according to the Annual ICE Report. How will the business reputation appear externally by making choices purely on cost?
- A survey with more than 10,000 travellers from 15 countries across the world, including Germany, France, Spain, and the UK has shown that travellers want new technologies to help make trips more “seamless” and quicker in the future but are also worried about cyber-security and data privacy.⁷

How to ensure your FD feels heard:

- Ensure that you prioritise sharp and slick data records. Cost centres and cost codes for projects, purchase orders, geographies, suppliers or divisions to enable invoices and reports to be itemised correctly all put an anxious FD at ease.
- Include them with access to your platform for bookings. There’s no reason why bookers, travellers, finance personnel, human resources, and travel managers shouldn’t all have access to the same information.
- Keep a log of your existing negotiated rates with individual hotels and chairs, so there’s visibility.



STEP 2: GET A HANDLE ON SOURCING

Now you've secured the budget and the buy-in - you need a great venue.

You likely have your favourites, but there can be merit in branching out from what you've always done. The hard part can be getting the perfect point that appeases the two representative stakeholders you work for - the business and the traveller.

While reduced rates can please the board, the travellers aren't best pleased with too much cost cutting. For the savvy travel manager, the answer is a platform with huge scope, and/ or, a remote team support system. Roomex offers both, and as such, we give guidance to travel managers often on how to choose a great platform or provider.

Things to ask your workforce travel technology platform provider or agency:

- How many hotels do you analyse?
- Can you offer project rates for crews?
- Can you arrange self-catering / apartments?
- How many options can you provide?
- How many people qualify as 'groups' for travellers?
- How many people can I book as part of general accommodation bookings in one go?
- Can I book meeting rooms without accommodation?
- Do you have unique rooms?
- At the same time, you have to ask the stakeholder group of employees what they need.

It's also key to book with your other stakeholders in mind. Before you touch a single filter, consider these questions.

Things to ask your employees:

- What are you looking for from the day/project/event?
- Where do you live and spend time?
- Where will you stay the night before / dates of X to Y?
- Will you drive?
- What do you like to eat and when?
- What matters to you most on this trip?
- Are there other opportunities to network, attend other events to benefit the business we need to consider?
- How would you like to feel afterwards?

This analysis can bring out really useful information. Do they need to feel relaxed, energised, and inspired? Do they want to connect with other people nearby? As such, should travel be extended for a few days, or should a late checkout be offered? Is there a way to maximise their stay or meet CSR goals?



I see many travel managers who are simply drained by their work - and I always tell them my secret is to nail down your dream requirements and understand what great looks like for your business, and then to get really close with a great team. At Roomex we source, negotiate, contract, and book accommodation and meeting packages, and we specialise in booking group rates for 9+ people per night, setting up project rates for crews, and finding suitable accommodation for long stays- and I've seen first-hand the relief when we take this off someone's plate!

- Konstantina Gida
Manager

STEP 2: GET FULL VISIBILITY

If we have learned anything since 2020, it's that anything can happen to our well-intentioned plans. For travel managers that have multiple long-term projects and crew teams out in various locations it's clear that managing multiple staff members across locations with variable factors means there is often some form of project creep that leads to disruption and often, exceeded costs in the meeting and events budget.

There are also costs from policy offenders who 'bend the rules' and hidden costs from suppliers that pop up.

What can you do to minimise the stress of these unexpected issues? We always say, seek visibility.

The Roomex platform helps customers book, manage and pay for all of their accommodation and expenses in one place - bringing control and visibility into all travel spending and we know that most overspend isn't down to employee wanting to bend a travel policy - but feeling that it was necessary.

Being able to analyse and prepare reports on travel spend and knowing that the policies, prices and plans are visible can be helpful for managers and travellers alike.



Businesses as a whole who have visibility into the key cost drivers behind workforce travel spend act in a more budget conscious fashion. When your whole team can see real-time data on policy compliance and spend distribution in a few clicks and you can see your top bookers, travellers and even policy offenders in one place, travel becomes a whole business project that everyone is empowered to understand.

STEP 4: IF IN DOUBT, PUT TRAVELLERS FIRST

We know that the business travellers of today are interested in a seamless experience when it comes to travel for events, meetings and projects- but that they are also worried about their data and online safety.

We also know from speaking to our clients that many travellers feel they have a more heightened state of awareness about their health and safety when it comes to travel.

Ever since the 'work from home revolution', travel has become a subject that does divide people, and it's key to be mindful of how that is handled sensitively within your organisation.

The travel managers who are ahead of the game are the ones who are showing employees, whether there are 8 of them heading off on a 6-week project or a large group checking in for a team building event, that when it comes to them physically being present somewhere on business time- you care what that looks and feels like.

Some ways to do this include the inclusion of surveys before each booking, or communication through line managers. Are there changes in personal circumstances that you should know about? People may potentially need more support than previously thought.



At a time when businesses focus on bouncing back, and the focus is on ROI and cost measures, for many, it's the job of a travel manager to be putting those things like safeguarding and your duty of care back top of mind. You are saying 'look, it isn't always about cost' - and standing by that as an advocate for the travellers - however long the stay is, and that's something that's really incredible.

STEP 4: DON'T GO IT ALONE

As with many parts of business, it pays to have expert advice on hand. Our cost calculator at Roomex shows the cost savings associated with changing a booking process from manual to a platform that gets you discounts and deals - but we also know that the real benefits are often less tangible - the positive feedback from an employee who didn't feel safe on a previous trip, but now relishes the idea of travelling since you made changes.

Perhaps you will get a big thumbs up from a crew team who love their self-catered space that allows them to get back and still enjoy social time together, or you'll see great uplift in NPS scores on the year that you arrange the venue and accommodation for your Summer gala with a new venue.

There are so many positive stories about how people are working with our teams to get the results they need, so don't go it alone. If you are a travel manager who would like to lighten the load of what has already shown to be a very unique and ever-changing year, then we would encourage you to connect with experts.

Things to ask your employees:

Roomex's dedicated Projects & Meetings team can help you book your next trip. Our experts specialise in booking group rates for 9+ people per night, setting up project rates for crews, and finding suitable accommodation for long stays.

Our team will source, negotiate, contract, and book accommodation and meeting packages designed for you, while RoomexAnalytics provides visibility and control of all Crew, Project, Long Stay and meeting bookings.

Roomex will provide one consolidated invoice, outlining the breakdown of spend by booking or project.

We will manage special requests like meals, parking requirements, and flexible check-in times.

Roomex, the leading workforce travel technology platform - experts in workforce travel.

Sources

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