

THE TRAVEL BROKER:  
CONCEPTS FOR A NEW BUSINESS PROPOSAL

by

Kenneth Lin

A.B. University of California, Berkeley  
(1981)

Submitted to the Department of  
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in Partial Fulfillment of the  
Requirements of the  
Degree of

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at the

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ABSTRACT

This paper proposes a new business venture-- the travel brokerage. The travel brokerage would be established specifically to provide corporations with a full range of travel consultancy, planning and management services for both long distance corporate travel needs as well as local, employee commute-to-work trips. This would be a unique service offering corporate clients "one-stop shopping" for their varied travel needs.

Long distance travel costs represent a major item in corporate overhead expenditures, though they are seldom recognized because such expenditures are fragmented. Despite the fact that such costs are escalating rapidly, many companies are ill-equipped to deal with this problem. The long distance travel department provides a full range of travel agency services (i.e. planning, reservations, ticketing, accounting, etc.) dedicated to helping businesses extract full value from each travel dollar.

The demand for employee commute planning by companies is a relatively recent phenomenon. Traditionally considered an employee's problem, employers are increasingly concerned about the difficulties workers encounter in commuting to work. From a corporate viewpoint, difficulty in commuting to work translates into difficulty in retaining a stable workforce, absenteeism, frustration and lower morale. Additionally, confronted with rising costs of subsidizing employee parking facilities, many companies are anxious to promote less costly commute alternatives. In rapidly growing metropolitan areas where transportation improvements have failed to keep pace with new demands, this problem is even more acute. Serving as a consultant to medium to large sized companies, the role of the urban travel broker is to analyze, formulate and implement a range of employee commute options promoting more efficient usage of existing transportation resources.

Combining long distance travel with urban travel planning creates a synergistic relationship whereby the travel brokerage is better able to offer a wide array of services than if these departments were separate businesses. Combining the functions of a corporate travel agency with those of a commute coordinator forms one comprehensive transportation consultancy service.

The purpose of this paper is to propose a new concept in which the private sector could fill the existing gap in disseminating urban travel information involving all modes of transport. This approach differs from government sponsored transportation information brokerage by drawing upon the entrepreneurial concepts of a travel agent, and then applying them towards public transit brokerage services.

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### About this paper

The ideas presented in this paper are deliberately conceptual, since it is intended to serve as a preliminary discussion of the travel brokerage as a concept, and not as a detailed financial analysis of a business plan. Instead, this paper should be thought of in the broader context of being educational, to introduce the reader to new perspectives in transportation problem solving, and to serve as a basis for further discussions. Ultimately this could lead to a business plan, and perhaps actual implementation of the ideas discussed.

As a conceptual proposal, the structure of this document differs from many traditional case-study theses. Rather than researching a past case study with the experience of hindsight, knowledge of outcome, and a large body of existing literature to draw upon, this topic is more open ended. Thus definite conclusions are more difficult to project.

Terminology used:

Because of the newness of this topic, exact terminology for various concepts have not evolved. Many concepts are referred to by a variety of synonyms, depending upon exact context of usage. Listed below are some of the key terms used in this paper and their synonyms.

Travel Agent Also referred to as: travel planner, travel consultant, travel counselor, etc. One who deals with long distance, intercity travel planning for clients.

Corporate Travel Agent Either a travel agent who deals specifically with corporate clients, or an in-house travel agent hired directly by a corporation.

Retail Travel Agency A travel agency specializing in vacation/leisure travel needs.

Computerized Travel Agency Also referred to as: automated travel agency. An agency equipped with computer terminals directly connecting into airline reservation systems. Such computerization allows reservations, information retrieval, ticketing and seat assignments to be instantly performed. In non-computerized travel agencies, these functions are performed manually.

Commute Coordinator Also referred to as: an urban travel agent, transportation broker (UMTA terminology), urban travel planner. One who specializes in planning and coordinating local, commute-to-work trips. A commute coordinator provides brokerage services matching transportation demand with transportation resources in the most efficient manner possible.

Travel Brokerage The title of the proposed business venture. A travel brokerage would combine the functions of a travel agency (specializing in corporate, long distance travel) with those of a commute coordinator (specializing in local commute planning) to form a comprehensive travel management company.

Transportation Systems Management (TSM) An Urban Mass Transportation Administration (UMTA) philosophy of making more efficient use of existing transportation resources by incrementally adding low-cost capital transit enhancements. These improvements may be in areas of administration, operations, small scale capital improvements, financing, etc.

## 1.0 An Overview of the Proposal

This section provides an overview of the travel brokerage as a concept with more specific details discussed in the following chapters.

### 1.1 A New Venture

Designed to respond to the changing transportation needs of today and tomorrow, the proposed venture adopts the Transportation Systems Management (TSM) philosophy of making more efficient use of existing transportation resources through programmed incremental improvements.

The proposal is to establish a comprehensive travel brokerage service, expanding upon the concepts established by the traditional travel agency. Such a brokerage service would provide a full range of travel consultancy, planning and management programs for both long distance business travel needs and local, employee commute-to-work trips. The proposed travel brokerage would function as two coordinated entities-- long distance travel planning and urban travel planning. These two departments specialize in resolving two growing, major areas of corporate concern: 1) more cost-effective management of corporate travel, and 2) facilitating employee commute-to-work travel. The latter topic is a growing concern and will be discussed in greater detail in this paper.

Thus, the unique ability to provide "one-stop shopping" yields several benefits for the corporate client as well as the brokerage itself.

For the corporate client the benefits include:

\*Uniformity/Continuity of service Company travel planning can be coordinated under one uniform travel brokerage/management service which



can be tailored to suit a company's unique travel needs.

\*Centralized Information Both local and long distance travel information can be obtained from one centralized source, streamlining travel planning.

\*Cost Control Centralized travel accounting procedures can be established to monitor and improve corporate cost controls and to help curtail expense account misuse. This service can be particularly advantageous for companies which submit competitive bids for services or products which involve a large amount of travel. By recognizing travel expenses and improving cost-controls, such companies could bid more competitively and attractively to clients.

\*Professional Expertise Given the competitive market environment, corporate travel planning is becoming an increasingly complicated profession requiring sophisticated, trained managers. Relying upon company travel planning which is performed on an ad-hoc basis by several untrained individuals or departments proves extremely inefficient. Centralizing these functions with experts, a travel brokerage, permits consistent implementation of corporate travel policies and expense auditing.

\*Public Relations Engaging the services of an urban travel broker provides good public relations for the contracting company. A corporation could publicize their progressive attitude to enhance their community stature. Additionally, retaining a travel brokerage could prove beneficial should a company seek community approval for new construction

or expansion. The travel broker as a promoter of commute alternatives can help allay community concerns over possible new traffic impacts

For the innovative travel planner the benefits could include:

\*Diversification At a time when the travel industry is undergoing drastic changes, expansion into non-traditional travel agency ventures such as urban travel planning provides entrepreneurial diversification. The travel agent faces two new threats: 1) the loss of "exclusivity" and 2) the development of airline-owned automatic ticket dispensers. The travel agent's recent loss of "exclusivity" as the sole retailer for airline tickets opens the door for other businesses such as banks, grocery stores, etc. to sell airline tickets. Secondly, the development of new automated airline ticket machines (similar to automatic banking machines/tellers) reduces the airline's dependence upon travel agents as a ticket distributor. By diversifying into urban travel planning, a travel agent is able to offer a wider range of services to corporate clients. This enhances the value of an agency, making it more difficult for grocery stores and ticket machines to compete in a travel agent's area of expertise.

\*Synergism A synergistic relationship is established by providing both long distance as well as local travel planning. The two specializations are mutually reinforcing since the same corporate client requiring local, employee commute planning will also generate long distance travel business and vice versa. By providing a full range of services, a travel broker would be able to capture both ends of the market. Operationally, there could be some cross-utilization of resources (people

and equipment) between the two functions.

Unlike a regular, retail travel agency, the services of a travel brokerage are intended to cater to the needs of corporate clients. The travel brokerage as envisioned would not be specifically established to process "walk-in" customers desiring leisure and discretionary travel information. Rather, a travel brokerage would contractually arrange to provide its services to clients in much the same manner as any other consultant would.

### 1.2 Long Distance Corporate Travel Planning: The Need Arises

More and more businesses are contracting with specific travel agencies for a number of reasons: 1) to capture various airline, hotel and other travel industry discount pricing schemes, 2) to secure volume prices from suppliers, 3) to establish centralized travel accounting procedures to improve cost control and 4) to improve reservation and ticketing services. This trend is expected to continue since the deregulation of the airlines has created considerable instability as to fares and services. Virtually daily, a plethora of new airline fares is introduced in an attempt to respond to various competitive market demands. This rapidly fluctuating environment creates considerable confusion for even the most experienced traveller.

Increasingly, travel agents are being called upon to keep abreast of these sudden changes. Just as a corporation would turn to its lawyer for professional legal advice, many businesses are recognizing the value of turning to travel agents for professional travel counseling. As part of the proposed business venture, the long distance travel department would

meet these corporate needs.

### 1.3 The Urban Travel Planning Department

#### 1.31 Commute Coordinators: A New Service Emerges

The urban travel planning department comprises the second half of the brokerage service and is modeled after California's commute coordinator concept. Commonly referred by the Urban Mass Transportation Administration (UMTA) as "transportation brokerage," commute coordination is a new service gaining increasing acceptance. Generally, a commute coordinator is hired directly by a company and serves as a travel agent who might specialize in planning local, employee commute-to-work trips.

The purpose of a commute coordinator is several fold:

- \*To encourage more efficient usage of existing transportation facilities by publicizing public transit services and coordinating ridesharing services such as buspools, vanpools, carpools. In consultation with contracting businesses and their employees, more efficient commuting habits are promoted by reducing dependency upon the single-occupant automobile as the sole means of transport.
- \*To promote a wide range of public transportation services, some of which potential users may be unaware of. Then in consultation with commuters, either collectively or individually, a personalized "commute plan" or itinerary can be developed. The idea is to analyze a range of possible alternatives, then select the option which best serves the commuter.
- \*To fill the void in disseminating local transportation information which may not otherwise be publicized for a variety of reasons.
- \*To work with company officials to implement corporate policies encouraging alternative commute habits.
- \*To serve as an advocate/lobbyist to affect reform in institutional policies (i.e. government regulations, unions, permits, etc.) which hamper the more efficient utilization of transportation resources.

An important factor determining a commute coordinator's success is the

ability to educate, to increase public awareness and to foster favorable attitudes towards using public transit. A coordinator, using a more personal approach, could prove very instrumental in eliminating some of the mystery surround the use of transit. This interactive approach is much more effective than any brochure. By encouraging fellow employees to "think transit," a new social environment supporting transit use could emerge.

#### 1.32 Commute Coordinators: Why are companies getting involved?

A new corporate attitude is emerging: public transit is of enormous importance to the business community. Traditionally considered an employee's problem, employers are increasingly concerned about the difficulties faced by employees in commuting to work. Why? From an enlightened corporate viewpoint, difficulty in commuting to work translates into difficulty in retaining a stable workforce. Additionally, confronted with rising costs of providing employee parking facilities, many companies are anxious to encourage alternate means of commuting so as to help stem this expense.

In some metropolitan areas where public transportation is not well developed, and where traffic congestion is reaching critical proportions, some of the larger, more innovative companies are taking the initiative and establishing commute coordinator programs. This corporate commitment has been demonstrated most notably in San Jose, CA where many of the manufacturers have formed transportation coalitions in conjunction with the public sector to resolve mutual problems. Further details of this program is discussed in the case example in section four.

The rapport generated between the public and private sectors has served

to strengthen the commute coordinator program and increase its effectiveness. Unlike other mass transit improvements (i.e. new subway construction, building a new transit garage, etc.) which requires direct government involvement and long lead times, a commute coordinator program may be quickly established by an interested corporation. Thus, a company is able to contribute to improving a region's transportation problems in a meaningful manner while avoiding the vagaries of government funding and institutional delays. As a recent concept, commute coordinators are gaining in popularity. It is an idea whose time has come.

### 1.33 Funding commute coordinators

The opportunity exists for private sector entrepreneurs to apply many of the same concepts found in travel agencies to commute planning, forming the basis for a lucrative business venture.

Traditional, third-party travel agents have proved extremely effective in disseminating complex, long distance travel information. This system of information brokerage has been well received by the public, with travel agencies selling some 55% of all airline tickets sold. (37) The growth in the number of travel agencies in the United States during the past ten years attests to its popularity as a business venture. From 1972 to 1982, the number of agencies grew from approximately 10,000 to over 21,000. (11) This growth is quite remarkable given the complex operating environment in which a travel agent must function.

There are several advantages arising from direct private sector operation of a travel brokerage service as opposed to direct governmental operation or funding:

- \*As an independent enterprise, the travel broker assumes the financial risks of the venture, at no direct cost to the taxpayer.
- \*There is no dependency upon scarce government transit funding, hence, a travel broker is not affected by potential transit funding cutbacks.
- \*A travel broker is not as likely to be subject to political pressures and distractions, allowing greater concentration on solving technical matters.
- \*Not subject to bureaucratic reviews, brokerage programs could be instituted more quickly.

Using private sector financing and initiative, travel brokerage services could, if successful, be replicated in many areas across the country following much the same concepts by which travel agencies have proliferated.

On the other hand, if travel travel brokerage operations were solely supported by government funding, limited amounts of transit funding would restrict the number of brokerage locations. Problems previously discussed might arise: political pressures and delays, threats of future funding cutbacks as subsequent administrative philosophies shift, etc. Animosity may develop from competing transit interest groups for scarce funding, diverting brokerage attention from resolving technical issues.

Basing the travel brokerage concept in the private sector allows precious government funds to be used for other transit programs in which private enterprise participation is not as well suited.

#### 1.34 Advantages of a Travel Brokerage service

A travel broker would incorporate the same functions as provided by existing commute coordinators and would expand upon their role. Whereas an in-house commute coordinator's domain encompasses only one corporation, a travel broker's domain will include several corporations in the same vicin-

ity. This expands the planning focus from one company to an area-wide or regional planning perspective.

Several advantages arise from this broadened perspective:

- \*Broader planning domain. Employee urban travel planning can serve a greater overall area (i.e. an industrial park) than commute coordinators working for individual companies.
- \*Less duplication of effort. If individual corporations were to undertake commute planning services, it is unlikely they would offer these services to employees of other companies. Without a travel broker, each business would have to initiate its own commute planning service which involves recruiting and training coordinators.
- \*Economies of scale. By contracting to provide urban travel planning services with several companies at once, the cost to each company is less than the cost of each company hiring their own in-house coordinator.
- \*Participation of smaller companies. Smaller firms presently desiring the services of a commute planner, but unable to justify such costs would be able to participate in this program. By contracting for brokerage services, the expenses would be less than if a staff member were to be hired and trained or recruited.
- \*Greater ridesharing permutations. Drawing upon an expanded pool of interested employees increases the probability of successfully matching ridesharing applicants.

For a corporation, there are several additional advantages in contracting for the services of a travel broker instead of hiring in-house staff.

These include:

- \*Quick implementation. A commute consulting program can be implemented much more quickly than a comparable company program starting from "scratch" since a travel broker has already assembled the prerequisite organizational framework.
- \*Ease of termination. Should the brokerage agreement prove unsatisfactory, it is easier for a company to terminate the relationship than to fire an employee. This seemingly negative attribute may be considered a positive selling point by encouraging reticent companies to experiment on a trial basis. Then, if all works out, the services of a travel broker could be retained on a longer term.



#### 1.4 The Challenge: The Role of the Travel Broker

"The public is becoming increasingly concerned as to how efficiently public funds are being spent on transportation services. Although the immediate catalyst may be the impending loss of federal transit funding, the pressures to reassess transportation services, how they are delivered and how they are financed have been building for years, fueled by increasing concern over rising operation costs, deficits and in some cases the disillusionment of how despite the costs, transit has been an unfulfilled promise." (45)

While perhaps somewhat too pessimistic, the above statement abstracted from current literature, cannot be ignored. Implicit in these concerns is the sentiment that existing transit resources should be used as efficiently as possible, and new innovative transportation ideas implemented.

Meanwhile, in many areas of the country, the private sector is beginning to realize that it shares an increasing responsibility for providing and supporting public services from which they ultimately benefit. This attitude has been prompted, no doubt, from financially pinched government agencies anxious to promote joint public-private cooperation. Simultaneously, the companies themselves are not immune to the need to improve corporate cost efficiency-- particularly in the areas of travel related expenses.

The proposed establishment of a travel brokerage, while not a panacea, begins to help respond to these varied needs. Among other things, a travel broker would aid in increasing the efficient utilization of the existing transportation system. Actively promoting transit services-- publicizing where they go, when they operate-- helps fill up what may otherwise be half empty vehicles. Increased ridesharing improves the occupant to vehicle ratio, making better use of present surplus capacity inherent in the system.

A travel broker helps corporations spend travel dollars wisely, stretch budgets, and introduces to managers a new recognition of how travel costs

are a major company expense. This is a key marketing element. The money a company saves on long distance travel costs could be used to pay for the services of the urban travel planner.

Acting as a third party intermediary, by bridging the often perceived gap between the private and public sectors, a travel broker could help open or strengthen transportation related communications between the two parties. The public sector could benefit from increased private sector cooperation and participation. And because a travel brokerage is a private company with no powers of taxation or regulation, it may prove less threatening to businessmen than someone from the public sector in opening new public-private sector dialogs. By increasing enlightenment all around, a greater spirit of cooperation between all concerned may ensue, while reducing suspicions arising from lack of communications.

## 2.0 A More Detailed Look at the Proposal

Insofar as the author has been able to discern, the travel brokerage is a concept without specific parallel in any body of literature. Combining long distance travel planning with commute planning has never been proposed or implemented, although components (i.e. dedicated corporate travel agencies, commute coordinators, UMTA transportation brokers, etc.) comprising this proposal have been successfully implemented on a separate basis. No one has yet researched the advantages of merging these two related fields into one economically viable enterprise.

### 2.1 Background: The need to specialize

As with many occupations, the travel industry is becoming increasingly specialized. The dynamics of the marketplace dictate this trend. Suppliers (i.e. airlines, hotels, car rental agencies, convention facilities, etc.) are continually revising their fares and services offered in order to respond to pressures from competitors. For any one travel agent to retain absolute expertise of all changes occurring in all travel sectors (i.e. international travel, domestic travel, cruises, rail travel, hotels, vacation packages, car rentals, etc.) and attempt to serve all possible travel markets presents an imponderable task taxing individual capabilities.

For this reason, while many individual travel agents are still knowledgeable in the fundamentals of the travel business as a whole, they are specializing in certain areas.

Heritage Travel of Cambridge, Massachusetts provides a good example

of a specialized travel agency involving a high degree of division of labor and professional concentration. Heritage Travel was founded in 1965 to cater specifically to the needs of the business traveler. Recognizing that corporate travel differs greatly from leisure travel, Heritage focused on providing special services not usually found in a retail travel agency. Within Heritage Travel there are several departments. These departments include: domestic airline reservations, international reservations, hotel sales, rail travel, meeting and incentive travel-- to name a few.

Perhaps its promotional brochure sums up Heritage's attitude towards expertise best: "At Heritage Travel, our people are trained to be experts in their specific areas. A domestic reservationist knows the latest changes in flights, routings and fares. Our hotel department concentrates on finding the room you need at the price your company is prepared to pay. The proper handling of business travel requires specialists, not generalists. Heritage Travel is a team of specialists working together to give personal attention to your itinerary demands." (20)

This emphasis on identifying a certain market niche, and then pursuing it by developing commensurate skills has made Heritage Travel one of the largest corporate travel agencies in the United States. The proposed establishment of a travel brokerage would seek to apply these same principles and spirit of innovation to developing urban travel planning as a new market niche. The philosophy of a travel broker is to identify emerging corporate travel needs, then to fulfill them with the specialized skills required.

## 2.2 The Two Divisions of a Travel Brokerage

Although a travel brokerage would combine two distinct fields of urban travel planning with long distance corporate travel management into one organizational framework, operationally it would be desirable to create two respective travel departments for several reasons:

- \*Different skills. Though the principles may be similar, the skills and areas of expertise between a local commute planner differ from those of a long distance travel planner. Both fields are specialized and require extensive training. However, employees could be cross-trained in the basic functions of both departments to permit flexibility and cross-utilization as needed.
- \*Different source of income. As envisioned, the long distance travel planning department and urban travel planning department would be financed differently. The long distance travel planning division is basically a specialized travel agency, primarily funded by commissions from suppliers (i.e. airlines, hotels, etc.) to finance operations. The urban travel planning department on the other hand has no such similar relationship. Its suppliers (i.e. transit systems, vanpools, etc.) generally do not pay commissions. Instead, an urban travel planner would rely upon contractual agreements with participating companies to finance operations. Ultimately, the intent is that the two divisions become self-supporting with a minimum need for cross-subsidization. Maintaining two different divisions facilitates such monitoring of finances.
- \*Different bonding requirements. Unlike a commute coordinator (or "urban travel agent"), a regular travel agent issuing tickets on behalf of transportation suppliers (i.e. airlines) must be bonded. These complex bonding rules and restrictions play an integral role in governing a travel agency's operations. By creating two separate travel planning departments, the urban travel planning functions are not governed by such bonding regulations.

Establishing two distinct travel planning departments (which may contain several sub-departments) promotes the development of specialists. Given the complexities of travel planning, this is a desirable attribute since the need to extensively cross-train all employees is reduced. Borrowing from Heritage Travel philosophy, a travel brokerage would be a

team of specialists working together to service the entire range of corporate travel needs.

Organizing into two main travel departments provides flexibility. A particular corporate client may not require the full range of services offered by a travel brokerage. In such instances, only the relevant department required by the client need be directly involved. Though not a specific intent, a travel brokerage would be capable of accommodating such clients requiring only limited services.

While the development of specialized skills is stressed within each of the two planning departments, emphasis should be made that the overall coordination and unity between the two sectors will not be sacrificed. There will continually be a need for managers, sales representatives and others to maintain a detailed working knowledge of all aspects of the travel brokerage. The demarcation of the two departments is primarily an internal company reference. Sales and marketing efforts will promote the overall unity and concept of "one stop," comprehensive corporate travel management. The two departments combined into one brokerage would benefit from economies of shared sales and accounting staff, computer support facilities and common goals of brokerage.

The following sections describe in greater detail the specific functions and elements of the two planning departments.

### 2.3 Functions of the Urban Travel Department

Listed below are some of the services the urban travel department could perform under contract to corporations:

- \*Solicit/develop/maintain a good working rapport with contracting corporations. Company cooperation is essential in a partnership of this nature.
- \*Formulate corporate urban commute policies based upon the unique needs of the company.
- \*Promote a range of alternative commute options which employees may be unaware of or never considered. Disseminate using a variety of methods, transit information encompassing all modes.
- \*Provide customized commute trip itinerary planning to employees, either individually or collectively.
- \*Sell/distribute transit passes, scrip tickets, etc.
- \*Coordinate/match ridesharing services for carpools, vanpools, buspools.
- \*Serve as a catalyst affecting institutional and legislative changes on issues directly relating to urban travel.
- \*Serve as an ombudsman/third party intermediary between employees/ company and providers of transit services.
- \*Maintain computerized services: Computerized employee trip profiles, mailing lists, transit service information, matchlists.

These above services represent a "shopping list" of ideas. The actual combination of services offered or required would depend upon local circumstances and demand. These urban travel planning functions are described in more detail as follows.

### 2.31 Company Attitude: An Important Determinant

The attitude of the client corporation plays an important part in determining the success of a commute planning program. If a company actively encourages employee transit use and ridesharing, the effectiveness of the brokerage is greatly increased. A company's willingness to innovate, its commitment to revise institutional policies to facilitate transit usage (i.e. preferential vanpool parking policies, overtime,

allowing flexible working hours, etc.) are major factors influencing employee acceptance. Conversely, without a cooperative company environment, the best intentions of a brokerage program may be sabotaged. The importance of cooperation between the broker and the employer was discussed in the UMTA Knoxville Vanpool Brokerage project. The Knoxville project which analyzed employer sponsorship of vanpooling found that:

"In the case of commuter trips, the employer influences work schedules, incentives to rideshare or use public transit, parking policy, overtime and other factors. Therefore the employer has much more influence in encouraging use of high occupancy vehicles than would a transportation operation that has no control over the major variables." (9)

Unfortunately, too often the transportation planning efforts emphasize enhancing the delivery of the transit services without taking into consideration the need to improve the corresponding corporate institutional framework which would encourage employee transit use. Given that most transportation systems have little influence over adverse company policies, and/or do not recognize this relationship, this is not unexpected. Involving the transportation brokerage in the planning process helps to remedy the problem. Because contracting for brokerage services is voluntary on the part of the corporation, the company is likely to be sufficiently enlightened to experiment with brokerage generated ideas. However, as the Knoxville Brokerage Project points out, "Company cooperation must be 100%, not just lip service." (24) Moreover, basing this urban travel planning/brokerage service in the private sector may also prove less threatening to companies as government action may sometimes be viewed with suspicious mistrust. Distrust of government agencies could limit a company's willingness to participate in urban



commute planning.

### 2.32 Contractual Agreements

The travel brokerage is intended to be composed of two planning departments-- urban travel planning and long distance travel planning. The long distance department is almost identical in function to that of a corporate travel agency and would depend upon commission income. The urban travel planning department on the other hand, has no commission income and would charge a consultant's fee for income.

The contractual agreement between an urban travel broker and the corporate client is proposed to be based upon a flat rate schedule. The length, terms and cost of the corporate contract for urban travel brokerage services would vary, depending upon a number of factors including the exact services to be required, a subjective "degree of difficulty" index and a number of other variables.

Ideally, longer term contracts are preferable to shorter term agreements, since the travel broker's financial stability is improved by the prospect of long term income. To encourage new or uncertain corporate clients into retaining the services of a travel broker, introductory and promotional rates could be offered. As the value of the brokerage service proves itself, the client may be induced to contractually enter on a longer term agreement.

### 2.33 Formulate corporate commute policies and implement institutional changes

Each company may retain the services of a travel broker for a number

of different reasons, with different expectations of goals and objectives. A travel broker would work with company officials to ascertain these objectives, then develop the most appropriate response strategies-- corporate commute policies-- to meet them.

An important component of these commute policies is implementing corporate institutional changes to help attain these objectives. As mentioned in the previous section, the employer can intentionally or unintentionally influence employee attitudes towards using alternate commute modes. The travel brokerage works with company officials to revise those institutional policies which conflict with the desired commute objectives, while retaining supportive policies. Possible positive institutional changes which could be implemented to encourage transit use could include: initiating staggered work hours, flex-time, eliminating free-parking or subsidized employee transit rides, offering employees who rideshare preferential parking facilities, etc.

The mix of institutional policies which might be implemented primarily depends upon the individual circumstances surrounding the company. Determining factors influencing whether new policies might be introduced include: management attitude and support, employee acceptance, type of company (i.e. manufacturing, high tech, service oriented, etc.), workforce composition, workforce demographics, feasibility-- and so on.

For instance, it would be unrealistic for a company heavily dependent upon employee assembly-line, shift work to adopt flex-time as a means of encouraging employee ridesharing. Instead, close-in preferential parking for vanpools might prove a more practical alternative. This could be quite attractive since long walks in the parking lot are eliminated, allowing

members of a vanpool to muster more quickly. Not to be underestimated is the publicity value of vanpool vehicles prominently displayed or parked on the "front doorsteps" to attract employee attention and to serve as a conversation piece stimulating thoughts of transit use.

#### 2.34 Promoting Alternative Commute Options

A key function of an urban travel department is to promote alternate commute options to the single occupant automobile. This may be accomplished by publicizing transit services, disseminating transit information and increasing an employee's awareness of the benefits of using transit.

#### Dissemination Problems

Public transit services often suffer from some degree of obscurity. Maps, information, schedules and trip planning assistance may be difficult to come by, thus discouraging many would-be riders. Certainly when compared to other modes, such as automobiles, the intensity of advertising in the media is nowhere as great. Transit advertising on television and in magazines seems to be the exception rather than the rule.

Complicating the information dissemination process is the obscurity of other transit modes. Traditional public perception envisions transit services as only composed of subways and buses. While these modes are the most visible transportation elements, public transit also consists of other services less thought of: shared ride taxis, carpools, vanpools, buspools, community sponsored transit, etc.

For a variety of reasons, many of these transit services go

unpublicized, and again, many potential customers who might find the services beneficial do not use them. Failure to develop publicity may include insufficient funding, inadequate staff resources, institutional constraints, poor marketing, and the possibility that the operators of the service may not recognize their value as providers of public transit. Shared-ride taxi operators, for instance, may not consider themselves as providers of public transit, when viewed in the traditional sense of bus and subway service. Yet it is important for all public transit modes to be be publicized if they are to enter a commuter's range of travel options. Based upon the UMTA Knoxville demonstration project, Davis reaffirms this logic:

"It is generally easy to solve a particular individual's transportation needs given all options available in a community, but it is virtually impossible to design any one type of service that meets all people's needs, all the time, under all conditions, without discrimination. Thus brokerage of individual needs is a manageable task, whereas the design of a large transportation system or network is an impossible task which seldom serves as many as desired." (9)

#### Publicity and education

Having identified problems relating to the dissemination of transit information, the urban travel agent seeks to overcome these barriers through publicity and educational efforts. This consists of two aspects-- active promotions and client counseling. Actively promoting alternative commute travel involves the urban travel broker "bringing the message to employees" and cultivating their interests. A wide range of methods could be used to achieve this objective. The travel broker could host employee seminars, educational presentations, luncheons, design advertising

displays, distribute promotional materials, submit articles for in-house company newsletters, issue internal memorandums, etc. These promotional efforts are similar to and are patterned after the Santa Clara County commute coordinator model (see case example).

While the previously described active promotional efforts are targeted at the broader audience, during client counseling, the emphasis is on fostering individual or small group consultations. Just as a regular travel agent and client meet to discuss travel plans, so too would an urban travel agent and his client. Client counseling provides a more personal, individualized forum for the travel broker and employee to discuss commute plans.

### 2.35 Coordinate/Match ridesharing services

An urban travel broker would serve as the focal point and coordinator for various ridesharing activities such as carpools, vanpools, and buspools. When user demand is insufficient to support traditional public transit modes (i.e. buses), ridesharing or para-transit offers a "halfway" alternative between regular, fixed route services and no transit service. Since no one transit product can serve all levels of demand, ridesharing broadens a commuter's range of options by introducing several "intermediate" options of transit service.

Brokerage may be particularly useful in metropolitan areas of increasing density. In developing areas where ridership is increasing, but not yet great enough to justify transit services, regular service could begin with taxis, jitneys, or limousines-- then finally be shifted to buses. The purpose of this concept is to eliminate the "all or nothing"

dilemma which is difficult for a transit authority to cope with.

Carpooling, vanpooling and buspooling allow those unserved by existing public transit to participate. It is particularly efficient since existing resources such as automobiles, vans and roadways are more intensively utilized, and is cost effective with users supporting direct operating costs. Unlike traditional fixed services, ridesharing can respond much more quickly to meet new needs. Operating decisions are made locally by the users-- not by a distant transit organization. Operations, routings and participation are decided by the consensus of participants.

Socially, ridesharing can be a positive experience enhancing the journey to and from work. This experience is an important selling point of ridesharing. According to Minneapolis commuters, the positive social atmosphere was the main attracting factor, with other ridesharing attributes such as saving money or eliminating the worries of driving, a secondary consideration. (47)

The role of the travel broker is to promote ridesharing by publicizing these positive attributes and by offering ridesharing as another component in a range of alternate commute options. The broker would be available to answer questions, allay common misconceptions and offer guidance and advice in establishing rideshare groups. With the aid of computerization, the broker would help match and coordinate interested commuters into appropriate ridesharing groups and assist in introducing potential commuters to one another if needed.

### 2.36 Work with existing suppliers/organizations when available

A key function of the brokerage is to work with and coordinate existing services when they are available. These services could include existing ridesharing organizations, community shuttles, private buses, etc. This is crucial to the process of brokerage as it is similar to a travel agency which searches and utilizes the best available suppliers of services.

Using ridesharing as an example helps illustrate this point. Since the travel brokerage is intended to be established in growing metropolitan areas, quite possibly an existing agency may have already been established to coordinate commute ridesharing. If so, then that agency could assume some of the previous functions described.

In Santa Clara County, for instance, local commute coordinators regularly exchange clients and services with a non-profit organization known as RIDES for Bay Area Commuters, Inc. RIDES Inc. provides a sophisticated ridesharing service for the nine San Francisco Bay area counties. In 1982 they participated with 232 employer ridesharing programs, processed over 40,000 ridesharing applications and started 72 third-party vanpool groups. RIDES offers a third-party, fully insured guaranteed lease of luxury vans on a monthly basis to participating vanpool groups. Or for vanpool drivers who wish to own and operate their own vans, RIDES has a comprehensive booklet The Owner-operated Vanpool: A Step-by-step Guide to Success. A bimonthly newsletter, RIDES CONFIDES, contains reports on RIDES activities, status of ridesharing legislation, maintenance and safety tips, and serves as a forum for communication among vanpoolers.

If, when a travel brokerage is established, a ridesharing organization such as RIDES, Inc. exists, then the travel broker's life would be simplified as they could arrange to exchange services. This relieves the travel broker of having to perform various vehicle leasing acquisition, insurance and delivery arrangements. The travel broker would be free to concentrate on promoting the service and attracting users. Depending upon circumstances, the broker could either 1) coordinate and match ridesharing groups then contract for RIDES to provide the necessary vehicles, or 2) the travel broker could help employees initiate a driver-owned and operated vanpool, or 3) the brokerage could forward client names individually to RIDES Inc. for them to match up into a ridesharing group. The first approach is favored when a broker seeks to insure that a group of employees from one company rideshare together; the second is useful for drivers who wish to vanpool and own the van; and the third approach is useful for matching individual commuters.

In the absence of an existing ridesharing organization such as RIDES, Inc. a travel broker would also assume the additional tasks of serving as an intermediary in securing vehicle leases, insurance, delivery, and provide training seminars for vanpool drivers.



### 2.37 Sell/Distribute Transit Passes to Employees

The urban travel department could sell or distribute transit passes, bus tickets and other forms of transportation vouchers to corporate employees. Depending upon the corporation, different strategies for reimbursing transit users and distributing these above items could be employed.

Many corporations offer employees free month transit passes for a variety of reasons-- to encourage transit use, to help relieve crowded parking lots, to equalize the imbalance between an employee using company subsidized parking and the transit user who purchases a transit pass (and does not use the parking facilities), or perhaps for tax credits as is available in California.

Another approach provides employees with a monthly "transportation allowance." The company usually neither provides free parking nor free transit passes. Instead some form of payment is given to employees to spend as they choose to defer transportation costs. This encourages ridesharing since commuting expenses are reduced and a greater proportion of the transportation allowance can be "pocketed."

There are a variety of other possibilities available such as partial employer subsidy of parking and transit costs, payroll deduction of transit pass purchases, or perhaps providing no corporate parking or transit subsidies at all.

The travel brokerage can work with corporations to implement whichever combination of policies are compatible with company goals and objectives, taking into account the unique elements of demographics, geography, available transit, access, etc. Similar to the traditional travel agency which functions as a comprehensive ticket supplier, an urban travel agent could

stock a range of transit passes and transportation vouchers for any client wishing to purchase one. In addition to selling transit passes, a travel broker could assist clients in selecting the pass most appropriate to their needs.

Unlike the long distance travel planning department which depends upon commission income, the urban travel planning department relies upon consulting fees since transit systems do not generally pay sales commissions. There are however, two notable exceptions. Westchester County's monthly transit pass dubbed "Passport," offers retailers 50¢ commission for each pass sold. (28) This is primarily intended to involve small retailers (drug stores, convenience stores, grocery stores, etc.) in promoting transit pass sales while earning retailers a modest profit.

The Los Angeles based Southern California Rapid Transit District (SCRTD) offers travel agents a 10% commission on sales of their unique "tourist passes." As the name suggests, the "tourist pass" is aimed at attracting visitors onto RTD buses. In the past, the pass has been aggressively promoted in travel agent trade magazines, mass mailings, bus interiors, and other specialty ads. Sales have been quite successful.

These two innovations represent a conscious effort to involve the private sector in the sale of non-traditional products-- creating joint public-private partnerships to mutual benefit.

### 2.38 Serve as a Catalyst Implementing Institutional and Legislative Reforms on Pertinent Urban Travel Issues

One of the central concerns arising from the U.S. Department of Transportation (USDOT) brokerage projects has been the problem of institutional issues obstructing implementation of new services and the

prevention of greater transit innovation. The Knoxville transportation brokerage project reported:

"Institutional research and the advocacy of institutional change is perhaps the most important component of transportation research and demonstration. Only when institutions allow service to change to increase consumer acceptance will public transportation be an available alternative." (9)

The travel brokerage as a privately-funded advocate, is in a unique position to research institutions, promote more efficient use of transportation facilities and then recommend institutional changes required-- while remaining detached from the political process.

With a constituency of commuters, the travel brokerage could capitalize upon this position of representation to press for the removal of institutional barriers, or at the very least, research into alternate means of resolving such issues. Institutional issues in which a travel broker could prove helpful in resolving could include:

- \*Assisting vanpoolers in finding insurance companies willing to insure vanpoolers.
- \*Advocating for tax incentives for transit users to promote greater transit use.
- \*Advocating reduced automobile insurance premiums for transit riders. In Boston, transit commuters are entitled to a 10% discount on automobile collision and liability rates.
- \*Advocating for reforms in transit labor protection agreements (i.e. UMTA section 13(c) regulations) which hinder the initiation of alternate commute systems such as jitneys, shared-ride taxis, private buspools, etc.
- \*Educating government officials and others to recognize the value of supporting non-traditional transit services-- to look beyond simply viewing buses and trains as the only forms of public transit available.

The broker could serve to identify problem issues and to attract official assistance in their resolution. Representing the collective, a travel brokerage may help resolve institutional problems which have defied previous attempts by commuters acting individually, or commuters without specific expertise required for the situation.

2.39 Serve as an ombudsman/3rd party intermediary between commuters and providers of transit services, government officials. etc.

This function is similar to the previous task of serving as a catalyst for institutional change. A travel brokerage as a representative of various commuter interests, is the logical candidate to serve as an intermediary between the providers of transit services and the users. Should conflicts arise, or commuters wish to suggest service improvements, or should transit agencies desire feedback, etc. the broker could serve as a communications medium between the two groups. A travel broker's role is not intended to be adversarial, but constructive in promoting an exchange of ideas between users and suppliers. With good rapport, a broker could be an effective means of relaying such information among groups. Traditionally, travel agents have always performed a similar service in resolving client problems with airlines, hotels, etc. Applying these same ideas to commute brokerage is a logical extension of this service.

For the providers of transport, a travel broker could disseminate proposals regarding new services, service revisions, policy changes, etc. to commuters collectively or to specific groups. Transit and other planners could benefit from demographic profiles of commuters collected by the broker. This information could prove useful in revising or improving transit services.

Just as regular travel agents suggest service improvements to their suppliers a travel broker in cooperation with transit organizations could do the same. Specific suggestions regarding routes, frequencies, timings would provide meaningful planning input. For instance, a broker might recommend rerouting a bus line two blocks to serve a new industrial park unserved by buses. If acted upon, the transit agency benefits from additional riders and an increased constituency.

For commuters, the travel broker could represent their collective voice in seeking revised or improved transit services. Having developed a working relationship with the transit organization, the travel broker could prompt the transit agency to act on these commuter requests. A broker helps amplify a commuter's lone voice, one which may not otherwise be heard.

#### 2.40 Providing Computerized Services

In recent years, the computerization of travel agencies has been revolutionizing the travel agent's way of life by automating functions such as reservations and ticketing, which were previously performed manually. The same potential exists for an urban commute planner to use the computer in creative ways. An urban commute department could utilize computerization to provide the following functions:

\*Maintaining computerized employee trip profiles. A computerized file for each participating employee could be created to provide the urban travel planner with a demographic commute profile. Each file is intended to reflect the individual needs of the client, containing such information as name, address, company, travel origin and destination, mode of travel, commute schedule, work schedule, special needs, modal preferences, travel brokerage services frequently used, etc. Through computerization, the files could be automatically updated as any relevant information becomes available and a notice advising the changes automatically sent to the commuter.

\*Transit information/schedule data base. Transit information of a variety of modes could be consolidated into one centralized, computerized listing, and cross-referenced under a number of different indexes for flexibility of access. Information describing each transit organization, type of service, service area, routes, schedules, fares, rules and regulations would be maintained. Special services such as facilities for disabled travellers could also be inputted. This data base is intended for use by the urban travel planning department to assist in planning employee commute itineraries.

Centralizing different transit information into one source aids in planning modal connections and transfers. Possibly the data base could be made available to other interested subscribers with access via terminals/personal computers. Thus, employees could electronically access such information at remote locations without actually having to contact a travel broker directly.

As personal computers proliferate in homes and offices, the market for electronic schedules would expand and could be expected to gain popularity as its usefulness in providing centralized trip information becomes recognized. Ultimately, such electronic schedules could tie in with other long distance transportation schedules. Already, the publishers of the Official Airline Guide, the bible of the travel industry, has introduced an electronic version for home and business use.

\*Compiling collective statistical information about commuters. By maintaining commuter trip profiles on participating clients, this data could be aggregated to provide a macro-view of demographic trends, modal choices, travel patterns, popular origin and destinations and other statistical information. This information could be used to forecast emerging trends to aid in planning and revising transportation services.

\*Computerized ridesharing matchlists. Commuters interested in ridesharing can be matched to other commuters with similar origin and destinations by computer. Such variables as origin/destination, modal preferences, (i.e. buspool, vanpool, carpool), company location, employment schedules, personal preferences/social traits (i.e. non-smoker) would be taken into account. Once matched, copies of the matchlist can be automatically sent to all relevant parties. Commuters with special needs can be automatically "flagged" for attention.

Three-way conference calls to follow up the initial matchlist would be used to provide a more personal introduction, and "break the ice," between match commuters. The Minneapolis 3-M vanpool project found that telephone introductions dramatically increased the ratio of successful ridesharing matches. Prior to the telephone introductions, less than 12% of commuters matched resulted in success. Using an urban travel planner to introduce matched commuters to one another helps overcome the natural reticence for strangers to contact each other-- and in Minneapolis increased the success ratio to over 20%. (39) Thus, the travel broker would seek to combine the best of both automation and

the personal touch in dealing with clients.

\*Accounting. In addition to regular internal travel brokerage account-purposes, a computer could help keep track of items such as pass sales, payment status of pass subscribers, vacation blackout dates of pass subscribers (or when not to send out transit passes), subscription renewal notices, etc.

These functions represent sample applications of computerizing travel management and urban travel information systems. Additional uses will no doubt arise as new applications are found.

#### 2.41 Skills of an Urban Travel Planner

A background in transportation planning or a related discipline would prove useful for practitioners in this department. Urban travel planners should possess fluent oral and written skills for communicating effectively with clients and prospective clients. Knowledge of skills, practices and current issues of urban travel planning is essential. The urban travel planner should be a conceptual thinker, able to respond creatively and imaginatively to a variety to ever changing circumstances. Mediation skills would prove useful in negotiating and working with other transportation planners, government officials, politicians, and clients.

For those urban travel brokers who would work with companies in formulating corporate travel policies, it would be desirable to possess all of the above skills as well as familiarity with the inside corporate environment so as to better understand the client's perspectives.

## 2.5 Long Distance Travel Planning

Of the several thousands of businesses in the United States, many do not take advantage of a travel agent's expertise in planning corporate travel needs. Those companies which do not utilize the resources of a travel agent may be missing out on an opportunity to streamline travel planning, secure volume prices and maintain tighter financial control as to where and how company travel dollars are spent. Oddly enough, the resources of a travel agency are seldom utilized to the extent that they should be-- even though a travel agent's services are generally offered free of charge.

Travel agents can offer services without charges since they are reimbursed from suppliers (airlines, hotels, car rental companies, etc.) of travel services. Thus the opportunity exists for travel agents to better educate potential business clients to the benefits of retaining a travel agency and aggressively pursuing this market.

### 2.51 Functions of the Long Distance Travel Planning Department

The long distance travel planning department could be considered for all practical purposes a travel agency catering specifically to corporate clients. Business travellers, unlike leisure travellers tend to be more time than price sensitive and maintain different values and priorities. Thus the long distance travel planning department would be patterned similarly after the Heritage Travel (Cambridge, MA) model previously described in this paper. Heritage Travel provides corporate clients with specialty services not always found in a retail agency.



These specialty services which could be provided include:

- \*Helping companies develop corporate travel policies. Many companies do not maintain formal policies or guidelines governing employee expenditures of company dollars. Consequently employees may either intentionally or unintentionally misuse expense accounts, company credit cards, etc. A travel broker could assist or provide consultation in establishing and implementing corporate travel guidelines. By "formalizing" such policies, guidelines and travel procedures (i.e. obtaining tickets, charging travel expenses, etc.) are made clearer and less subject to misinterpretation. If the company actively monitors travel expenditures, the temptation for an employee to misuse funds is reduced. Because of the extremely specialized and detailed nature of this work, a travel brokerage may assess a consultant's fee, depending upon his degree of involvement.
- \*Provide computerized services. The long distance travel planning department would provide a full range of computerized travel services. That is reservations, information retrieval, ticketing and other forms of travel documentation which might otherwise be performed manually are handled interactively via on-line computer terminals and printers.
- \*Maintaining computerized support services. Computerization could be utilized to provide support services such as maintaining data base profiles on frequent travellers, mailing lists, billing, travel destination profiles, a "low fares" data base, etc. The "frequent traveller" profiles would maintain updated information pertaining to regular customers--address, phone numbers charge card numbers, passport information, airline, hotel and car rental preferences, etc. This service avoids repetition when booking frequent travellers, saving time and effort. "Travel destination profiles" could provide centralized information on visa requirements, climate, currency and vaccination regulations, special events, travel bulletins, etc. This computerized listing is similar in function to the urban travel planning department's "transit information/schedules data base." In some instances, the above services (i.e. the low fares data base) can be purchased via subscriptions from outside companies providing such information. Otherwise the travel brokerage would compile the necessary profiles.
- \*Volume rates. By centralizing a company's purchasing power, a travel broker utilizes this clout to leverage preferential volume rates from travel industry suppliers (transportation companies, hotels, etc.)
- \*Accounting. In many companies not affiliated with a travel agency, travel arrangements are often performed and billed individually. This piecemeal billing procedure makes it difficult for a company to gain an accurate picture of the aggregate travel expenses. By channelling all travel arrangements through a travel broker,

corporate travel charges are consolidated into one focal point for billing. This facilitates accounting and review. To help corporations monitor expenses, predetermined controls and budget allocations could be arranged. Periodical status reports could update corporate executives on travel expenditures.

\*Special services. To go "that extra mile," a travel broker could provide special services including ticket delivery to corporations, provide essential travel documents (visa, passport forms, insurance, etc.), and coordinate other special services such as arranging for charters of corporate jets, limousines, club buses, etc.

\*Develop corporate incentives programs. A travel brokerage could also aid companies in developing corporate travel incentive programs as a means of rewarding/motivating company employees.

\*Leisure travel. Though the travel brokerage is primarily organized to serve business travellers, the brokerage could also handle leisure travel needs of employees.

## 2.52 Skills of a Long Distance Travel Planner

The long distance travel planning department is basically a corporate travel agency so the skills required are similar to those usually found in such agencies. For the brokerage, there is a need for travel agents who are specialists in the realm of corporate travel planning. These agents should possess fundamental knowledge of the travel industry and agency operations, possess good sales aptitude, and be fluent in the use of the various airline reservation and ticketing computer systems. Like their urban travel counterparts, and perhaps foremost, such individuals should be creative and adaptable to the continuing changes and challenges of the travel industry.

### 3.0 Developing the Travel Brokerage-- Alternative Approaches

Since the travel brokerage is a specialized combination of a corporate travel agency and an urban travel planning department, the prerequisite number of employees and skill can be quite large. Heritage Travel of Cambridge, MA, for example, has over 100 employees at their main office alone. The resources needed to assemble these skills may prove well beyond the scope of a business just starting out.

Therefore, rather than attempting to provide all functions and services for corporate clients from the outset, another approach might be to develop the travel brokerage incrementally. By concentrating on certain aspects of a travel brokerage initially, as growth occurs, additional services could then be offered. There are several options of how a travel brokerage could be initially structured. These options include:

- 1) Developing the urban travel planning department as a viable independent business separate from any corporate travel agency. Then as the brokerage becomes more established, they could either...
  - a) affiliate or merge with an established travel agency, or...
  - b) create a new corporate travel agency as a new brokerage planning department.
  
- 2) An existing corporate travel agency could establish an urban travel planning department as a means of diversifying services and providing a full range of brokerage services.

Expanding the travel brokerage incrementally offers several advantages:

\*The need to amass larger amounts of financing and the recruitment of additional skilled employees is reduced. Initial startup costs

are lowered.

\*A smaller agency is easier to establish and manage. Initially, the brokerage could concentrate on providing certain services only-- not the full range of services. This concentration facilitates staff training, familiarity with agency procedures, and quality control. Once employees become familiar with day to day operations and the reputation of the agency is established, additional brokerage services could be added.

\*Should an urban travel brokerage purchase or merge with an existing corporate travel agency, the procedural formalities involved in establishing an entirely new agency are avoided. The travel brokerage benefits from acquiring the reputation of the existing agency, the organizational framework and the clientele base.

Thus the flexibility in structuring a travel brokerage allows adaptability of response to various local circumstances. This allows the travel brokerage to grow incrementally-- avoid the "all or nothing" business scenario.

#### 4.0 Santa Clara County's Commute Coordinators: A Case Example

The concept of an urban travel planning service was partly derived from two precedents-- 1) from UMTA sponsored demonstration brokerage programs, and 2) from the emerging role of "commute coordinators" in Santa Clara County, California. This case example describes more about what's happening in Santa Clara County, how commute coordinators came about, and possible future implications.

Why are Santa Clara County firms hiring commute coordinators to help their employees get to work? Do firms really need a commuter coordinator, and besides, don't employees already know how to get to work? A relatively recent Bay Area phenomenon, commute coordinators are sponsored directly by private businesses. In Santa Clara County, commute coordinators arose as a logical response to the valley's increasingly severe transportation problems.

#### 4.1 Background: Geography

Unlike the relatively compact scale of the east coast cities which feature a downtown focus and a well developed public transit system to service it, Santa Clara County is of an entirely different character. Located at the southern end of the San Francisco Bay, the geographical shape of the county roughly resembles an inverted triangle. Generally, the county is thought of as being divided into three parts. North county (comprising the cities of Palo Alto, Mt. View, Sunnyvale, Los Altos), central county (Cupertino, San Jose, Campbell, Milpitas, Saratoga) and south county (San Martin, Gilroy, Morgan Hill). Distances within the county tend to be long-- from Palo Alto in the north county to Milpitas in the east-central part of the county spans some 25 miles. From Milpitas to the south county

cities, the distance is approximately 50 miles.

Of the nine San Francisco Bay Area counties, Santa Clara is the most populous and the fastest growing, currently home to over 1,300,000 residents. Within the county, a continuous network of low density, "spread" cities (Palo Alto, Mt. View, Sunnyvale, Los Altos) flank lower San Francisco Bay, expanding-- as the surrounding mountains constricting development give way-- into the huge urban sprawl comprising the greater San Jose area. Already a miniature version of Los Angeles, San Jose recently surpassed San Francisco as the larger and more populous city.

The transformation of the valley has been rapid. Only 30 years ago, the valley was known as the "prune capital of the world." Today, the orchards have given way to another more lucrative cash crop-- electronic industrial parks producing "silicon chips." Hence, the new nickname "Silicon Valley" to describe the profusion of electronic firms in the area.

#### 4.2 The Jobs Imbalance

In the 1950's and 1960's, Stanford University in the north part of the county provided the focal point for innovative research and new entrepreneurial activities. The availability of qualified graduates and industrial park sites encouraged new electronic firms to cluster nearby. This trend has created a "jobs belt" stretching from Palo Alto to Sunnyvale, and more recently to San Jose. Simultaneously, this boon to the local economy has resulted in a "jobs imbalance" with respect to land use. While major new electronic companies have clustered in the northern part of the county, new housing for the workers tends to be located in the

central and southern parts of the county where undeveloped tracts are available.

In the north county, increasing numbers of prospective home buyers chasing a severely limited housing supply has sent demand and prices skyrocketing. As a result, many employees unable to find housing close to work find themselves living further from their jobs and commuting longer. The continued growth of the county has exacerbated this trend.

While older cities developed along streetcar or rail lines, Santa Clara County expanded in the age of the automobile which served to encourage low density development and neglect the development of mass transit. Since most employment is concentrated in industrial parks and not in traditional downtowns, the predominant commute mode is by single-occupant automobile. Lacking a well developed system of public transit, local residents are heavily dependent upon automobiles for transportation. This dependency has led to severe rush hour congestion on all of the county's major freeways and expressways such that by 1980, the average commute was 12 miles in each direction, consuming approximately one hour each way.

To help remedy the lack of mass transit, a multi-modal, county-wide transportation agency was created in 1972. The agency operates three county airports, a large network of county expressways, and an expanding county bus service. Introducing public transit to a county which developed around the automobile has presented challenges. The rapid growth of the county has placed the transit agency in a reactive, "catch up" response-- because of new transit demands brought about by recent urban developments--

distracting the agency from helping to play an active role in influencing county land use patterns.

Unlike the flashy new BART system or the rejuvenated light rail network in San Francisco, both of which have captured the commuters' and the media's attention, public transit in the county is composed of less glamorous services such as local buses, express buses, buspools, vanpools, carpools, and community shuttles. Also unlike the distinctive new rail systems, a vanpool transporting a dozen passengers is low profile transit, such that it tends to blend in with other vehicles on the road. Consequently, many potential transit riders are not even aware of the full range of these services.

Another problem concerns habit. Citizens in transit-oriented cities such as New York, Boston, Toronto or Montreal may consider riding transit to be as natural a part of life as breathing. In automobile-oriented Santa Clara County, because of the lack of viable transit service for so many years, transit riding has become a "lost habit." Although county bus services have been steadily improving and expanding, many residents are simply not accustomed to considering the bus as another means of traveling.

#### 4.3 Enter: The commute coordinator

Against this background of an increasingly difficult commute, employers were becoming more and more concerned about the possible implications to their workforce. Already, there were signs of trouble. In 1980 there were over 10,000 unfilled jobs in the county-- and employee



turnover was increasing-- partly due to employees rejecting an increasingly long and expensive commute. Thus, the commute problems progressed from merely being an annoying inconvenience to a serious situation in which the continued economic growth of the county was threatened with vehicular gridlock. To help retain their workforce, in addition to usual measures of increasing employee salaries and benefits, many large companies undertook the innovative step of hiring "commute coordinators." The purpose of the commute coordinators was to help employees get to work by reducing their dependency on driving individually and by expanding their range of commute options. This involved publicizing, promoting and educating employees-- employees who often thought there was no choice but to drive-- to other transportation possibilities.

#### 4.4 Initiating the Program

Many companies cooperated with the Metropolitan Transportation Commission (MTC) in establishing its commute coordinator program. Serving as the San Francisco Bay Area MPO (Metropolitan Planning Organization), the MTC is responsible for distributing federal transit funds to local bay area transit agencies, as well as providing overall regional coordination of transit services. In 1980, the MTC established a commute coordinator program which sought to involve the private sector in encouraging the use of alternative options to the single occupant automobile as the primary mode of worker transportation.

A comprehensive training manual, and a program to train commute coordinators to assist employers in establishing commute alternative

programs were developed. The manual includes information on the spectrum of alternatives. Information on contingency planning for a possible energy shortage, transit strike or other emergency situation is included. Slide shows and field trips are used to assist in the training sessions. Follow-up workshops on such topics as marketing and data collection are held. Additionally, a newsletter, Coordinator Connections, is distributed bimonthly to participating coordinators.

This novel partnership between the public and private sector in resolving mutual transportation concerns is a recognition that no one mode of transport can possibly serve all commute travel demands in the Bay Area. Instead of relying upon one particular mode, the approach is to "broker" or match available transportation resources to transportation demand to yield the most appropriate combination of travel modes to serve the needs of a particular company. The commute coordinator serves as this broker in developing commute alternative programs tailored to match employees' travel needs.

Dwindling highway and transit capital funding offers little opportunity to embark on new large-scale construction projects. These fiscal limits have served to refocus Bay Area transportation planning priorities from "expanding the transportation network" to better utilizing the "existing network" resources. The commute coordinator is one of many TSM institutional measures employed to meet this objective.

#### 4.5 Bay Area Incentives Promoting Transit Usage

The following, mostly abstracted from the League of Women Voters'

publication, The Bay Area Monitor, is a sample of various San Francisco regional incentives designed to promote transit usage and awareness.

HOV Lanes. A number of high occupancy vehicle (HOV) lanes are reserved for ridesharing vehicles of two or more occupants and transit buses: Rte. 101 in Marin County, I-280 and Mission Blvd. in San Francisco, Grand Avenue in Oakland to the Bay Bridge, and San Thomas Expressway in Santa Clara County. Presently new HOV lanes are being constructed on Rte. 101 in Santa Clara County.

Ramp Metering. Ramp meters regulating the number of vehicles entering a freeway and which also provide a bypass for high occupancy vehicles are in operation on I-280, Rte. 17 and Rte. 101 in Santa Clara County.

Toll-Free Bridge Crossings. High occupancy vehicles and transit buses cross free during commute periods on the Golden Gate, Bay, Dumbarton and San Rafael Bridges.

Park and Ride Lots. Caltrans (California State Department of Transportation) operates approximately 50 park and ride lots in the region, with several more planned. Caltrans also sponsors free vanpool parking in San Francisco.

Lockheed Missile and Space Company, Sunnyvale. An on-site bus stop and shuttle service connecting with other public transit services are provided. Lockheed's commute department also sponsors various publicity and ridesharing incentive contests rewarding winners with cash, free gasoline and other prizes.

Rolm Corporation, Palo Alto. Employees riding transit for three months are given free transit rides for the fourth month.

Shugart Associates, Sunnyvale. Daily bus use by 25% of its employees is subsidized.

Syntex Corporation, Palo Alto. A 25% subsidy is provided for employee vanpool commuting costs. Bus tickets are sold on site. A full time commute coordinator has developed an in-house logo to identify all corporate information promoting transit. Approximately 37% of all employees use some form of commute alternative.

Western Electric, Sunnyvale. Preferential parking of car/vanpools is provided.

Optical Coating Laboratory, Santa Rosa. A guaranteed cash incentive is given to ridesharers: Carpools of three or more persons have a reserved parking space and receive a \$1.00 coupon daily. Bus riders, bicyclists, motorcyclists and walkers receive a \$.50 coupon daily.

A monthly drawing award doubles the amount of money earned to winners in each category (except walkers). Since it was begun in April 1980, the program has cost the firm approximately \$14,500.

Employer Tax Credit. A California State tax credit is offered to employers sponsoring ridesharing programs and employee transit use subsidies.

Business Deductions. Various employer expenditures related to the subsidizing of ridesharing activities may be allowed as a business deduction.

Individual Tax Deduction. Up to \$7.00 a month may be deducted from California state income taxes for each monthly transit pass (of 40 or more rides) on public buses, trains, ferries, or for participating in a car/vanpool or subscription taxipool.

## 5.0 Conclusions

The proposed travel brokerage is the culmination of two concepts-- 1) the concept of urban travel planning and 2) continuing this idea of urban travel planning with a corporate-oriented travel agency so as to create a comprehensive brokerage service. Because these proposed ideas are speculative in nature, and not yet a reality, they cannot be tested for their validity. In the absence of such supporting evidence, it is difficult to project outcomes. Conditionally, it appears the travel brokerage is a feasible venture to warrant further study.

Combining commute planning and long distance travel planning into one brokerage is similar to synergism found in many other consultancies which combine diverse functions into one organization. For example, it is not uncommon for a transportation consultancy to perform architectural, planning, engineering, computer and marketing functions-- or for a business management firm to perform accounting, management analysis, computer programming, legal research, etc. Though these functions are distinct specializations which enable them to be established separately, for reasons of synergy, many consultancies combine these services to provide clients "one-stop shopping." Judging by the proliferation of such consultancies, this idea seems successful.

This paper has discussed the proposed travel brokerage at a highly conceptual level. Therefore, should an entrepreneur wish to pursue such a brokerage, more specific details would need to be addressed. These details involve relating the conceptual proposal to the specific geographical and environmental context selected by the entrepreneur. A travel brokerage may not prove to be a viable undertaking in certain

areas or in certain instances. Further study of local contextual issues helps determine this feasibility.

Developing a market research assessment helps ascertain the local demand for such brokerage services, and is an essential prerequisite element. A market survey could address, but not be limited to, the following issues:

- What types of companies are best suited for brokerage activities?
- How many potential, suitable companies are there?
- Are they likely to be interested in a broker's comprehensive range of services?
- How many companies presently affiliate with travel agencies/consultancies?
- Who are the travel broker's possible competitors? Is the brokerage market saturated?
- What are the immediate and long term economic forecasts for the local area? Demographic trends? (Is the region growing, stagnating or declining?) Are new companies likely to grow in the area?
- Is the commute situation severe enough to attract employees/employers to an urban travel broker's services?
- Are the existing public transit services well developed (which may decrease the need for a broker's services)?

Additionally, specific issues regarding the organization of the proposed brokerage need to be studied. The development of a business plan would help answer some of these questions. They could include the following:

- \*Incremental expansion versus total systems development. Is the travel brokerage to be developed incrementally or all at once? If incrementally, what are expansion priorities and time-frames? Which of the following scenarios would be most appropriate given local contextual circumstances?
  - 1a) Establishing the urban brokerage first, then establishing a corporate travel agency?
  - 1b) Establishing the urban brokerage initially, then either merging, purchasing or affiliating (i.e. contracting services) with an existing corporate travel agency?

2) Establishing a corporate travel agency which then expands into urban brokerage?

\*Personnel requirements. What are staffing needs? Job descriptions? Special skills required? Salaries? Terms of employment? Recruitment procedures? What degree of overlapping skills might occur between the two functions of urban and long distance travel planning? Do seasonal travel patterns emerge, which dictates the need to interchange staff between the two brokerage functions? To what extent is the staff flexible enough to be interchanged between these two functions?

\*Brokerage income. What are specific services to be offered locally, and what are these income projections? How is this income source divided? What are the expected income ratios from particular services? Are certain brokerage income sources likely to be growth areas? How many clients are required to make the brokerage financially feasible? What is the contractual rate schedule, terms and conditions?

\*Marketing strategies. Developing a marketing plan would help formulate a strategy of promoting brokerage services-- detailing a "plan of attack." What are these specific elements? What sales approach will be used to contact potential clients (i.e. salesmen, direct mailings, telephone interviews, etc.)? What are some of the intrinsic benefits offered by the urban and long distance brokerage services which could be used as specific selling points (i.e. helping corporations save travel dollars, reducing the need to provide costly employee parking facilities, company airline ticket delivery, etc.)?

Some of these questions raised tend to be rather subjective and difficult to answer. To measure them, there is a need to monitor these early efforts and develop performance indicators once the venture is started. Depending upon local circumstances surrounding the brokerage, these indicators could include measuring the brokerage's financial health, productivity, effectiveness, etc. Such measures of these aspects could include:

Income-- total brokerage income, profitability measures, retained earnings, debt-equity ratios, income as a ratio from various services, number of contracting clients, income growth, total revenues, etc.

Productivity-- revenue/employee, profits/employee, manhours spent per particular functions, etc.

Brokerage effectiveness-- ratio of client company employees utilizing commute alternatives, estimated amount of company travel dollars saved, estimated energy and employee time saved, client satisfaction with brokerage services, major goals and milestones accomplished, etc.

To compile these performance indicators, a variety of sources could be utilized: accounting, sales reports client surveys and questionnaires, etc. By analyzing the successful and not-so-successful components of a travel brokerage, the organization can respond to these strengths and weaknesses and take appropriate action. The travel brokerage is intended to be a "fluid" venture adapting to changing needs and circumstances.

As future opportunities arise these could be embraced. For instance, perhaps employee vanpool vehicles, which generally sit idle midday, could be utilized for courier deliveries? Or perhaps as the brokerage grows, they could diversify into managing the client corporation's freight transportation. In a deregulated shipping environment this could be an area worthy of further study.

This concluding section has raised some of the issues regarding the feasibility of the travel brokerage as a business proposal. Though these issues are by no means exhaustive, they are prerequisite topics which must be dealt with to move the brokerage from the realm of conceptualness to reality. They are intended to serve as a basis for further analysis and discussion.



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