



Leadership Exchange

TMC Master Class Poll Data – August 2021

Dear Leadership Exchange Members,

Following is the complete set of poll results from our recent TMC Master Class series. As you know, we have been delivering our Master Class educational series over the last year. Many of you participate, and we hope you find it of value.

These 12 poll questions were administered throughout five classes to an audience of approximately 100 to 125. While we may share specific polls or portions of the report with the industry, in keeping with our Leadership Exchange promise, we wanted to let you have this information in its entirety ahead of anything we publish in the future.

We hope you enjoy the findings here. Once again, thank you sincerely for your participation in the Leadership Exchange.

Warm regards,

Your GoldSpring Team



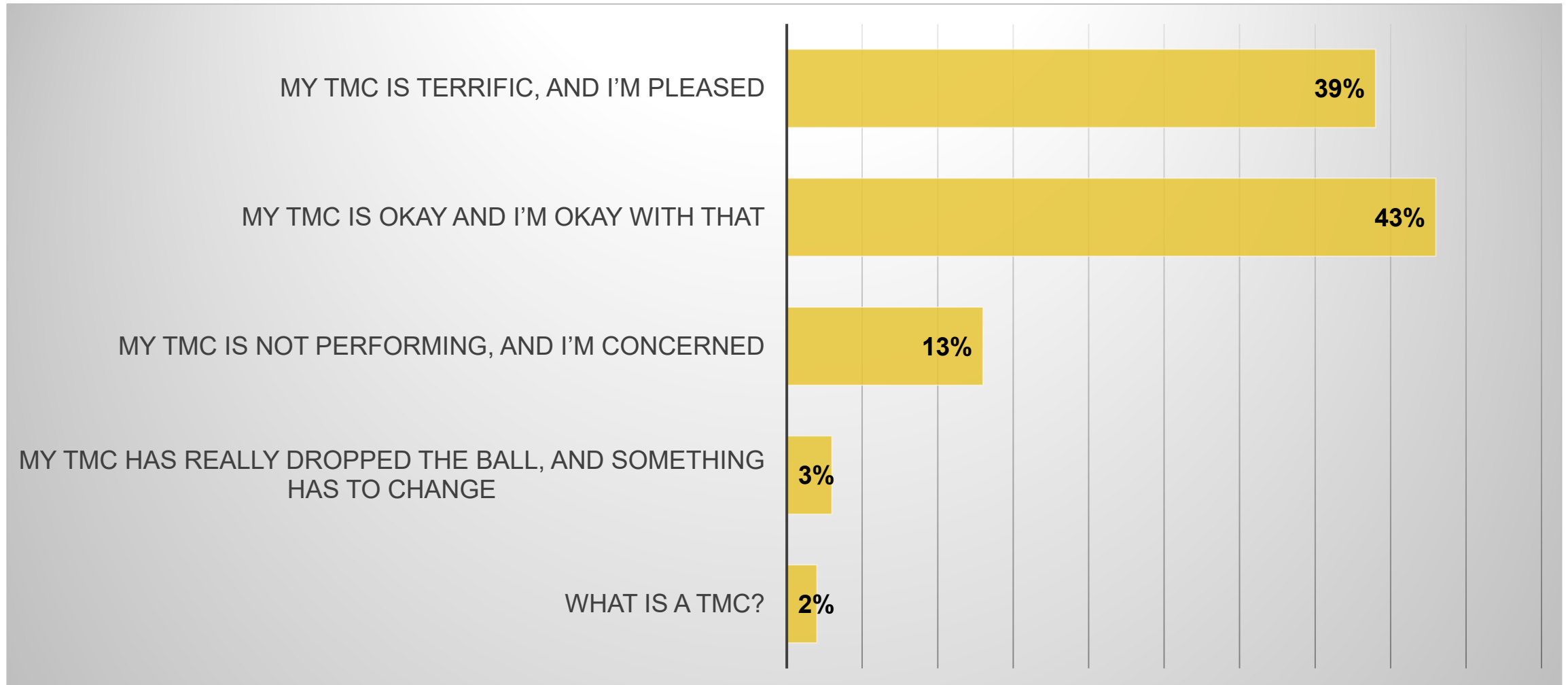
info@goldspringconsulting.com

Here are a few quick takes on the polling from our TMC Master Class. Complete poll data and charts follow.

1. 73 percent note significant/some pandemic-related change with TMC. Some were reactive to TMC's proposed changes and those that were proactive were able to get in front of these changes and shaped the changes which followed.
2. There is a significant preference for local, in-country service with one TMC globally. These two are often at odds - as global TMCs that are great in one country/area may not be elsewhere. So, the desire for great service that could be applied worldwide within a single global TMC remains the challenge of the buyer's strategy, sourcing, implementation, and optimization.
3. Wanting to keep SLAs simple, demonstrates the strategic focus buyers have driven with their TMCs -- less is truly more. Revisiting and keeping the SLAs refreshed, alive relevant (both when expectations are met and when they are not) is the truly holy grail.
4. Attendees note TMC billing is clear, well defined, easy to understand and auditable. True in many cases, but our deep dives with clients can reveal local office billing data may be lacking. Different accounting systems can hinder consistency and different billing methodologies are interpreted differently by office/country/location. Clear, comprehensive and complete billing data on a global scale is still a challenge.
5. 60% of attendees noted the best time to negotiate a contract is when the apparent successful bidder has been determined. GoldSpring sees leverage is greatest when hope is the greatest - when you release the RFP. At this time, it's anyone's chance, so hope is at it's RFP process peak!
6. 76% noted it is best to review the contract every year - what a wise group! This ensures contract language, pricing, SLAs, and KPIs are kept top of mind, and any issues can be mutually agreed should course corrections be needed.
7. Finally, buyers still feel they are able to control compliance and drive behavior and buying decisions over the TMC and airlines direct marketing.

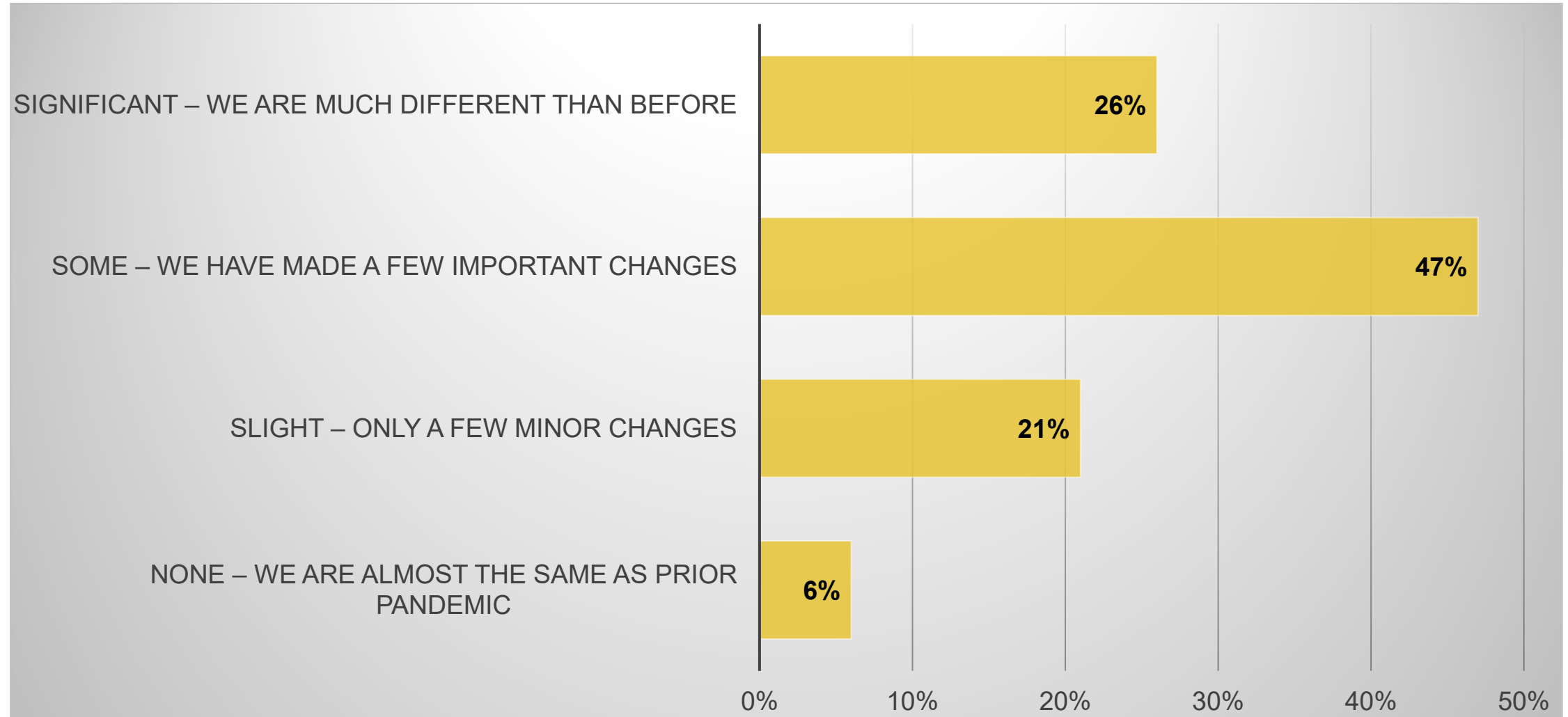
Which best describes your current (or most recent) TMC relationship?

2



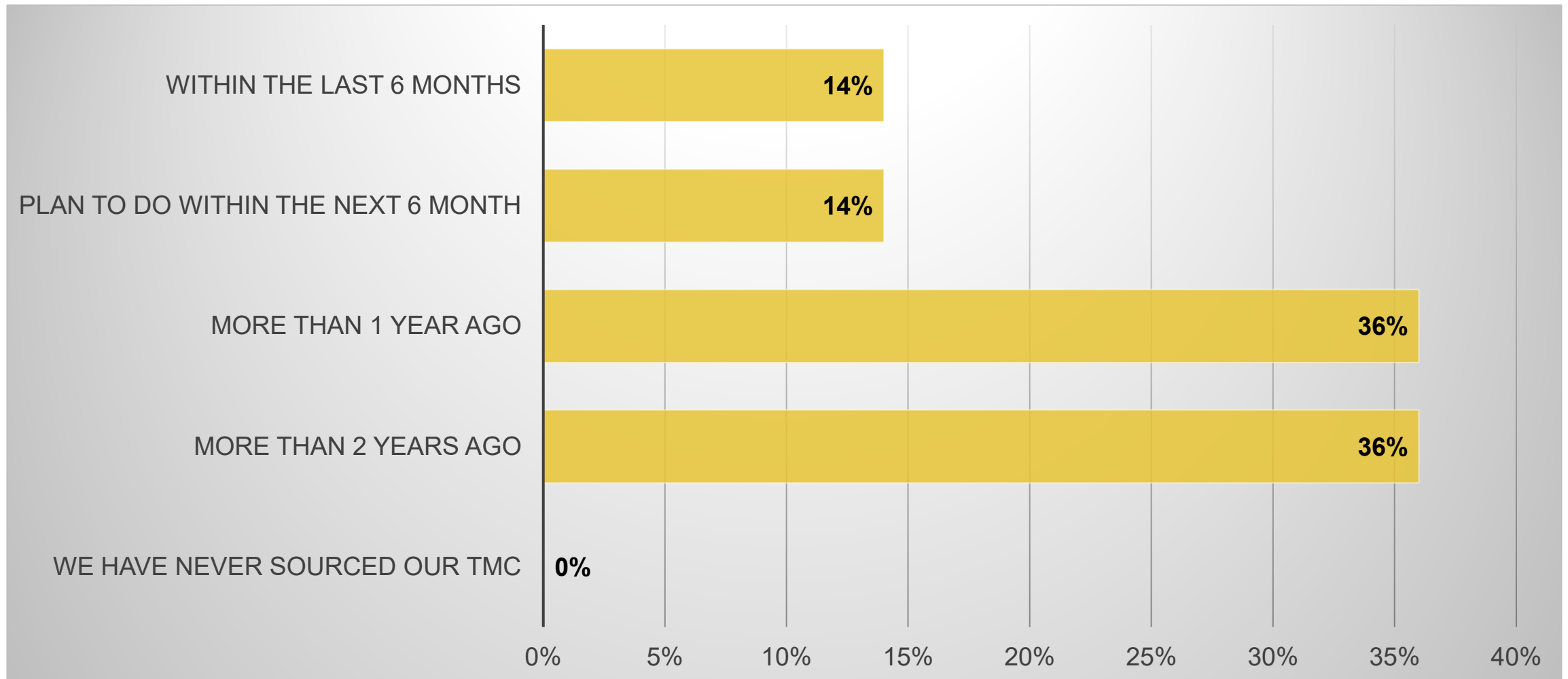
As a result of the pandemic, what level of change have you experienced with your TMC?

3



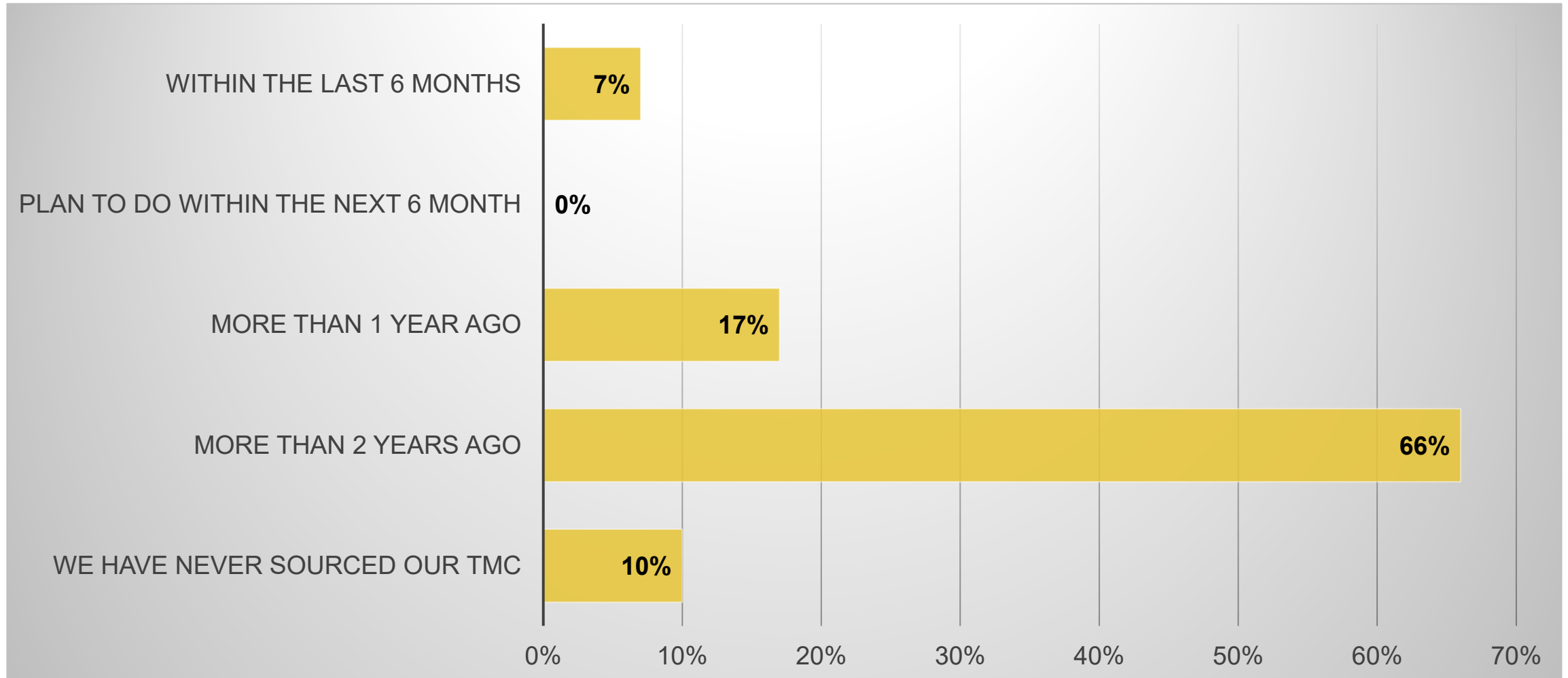
When was the last time you ASSESSED, NOT SOURCED, your TMC?

4



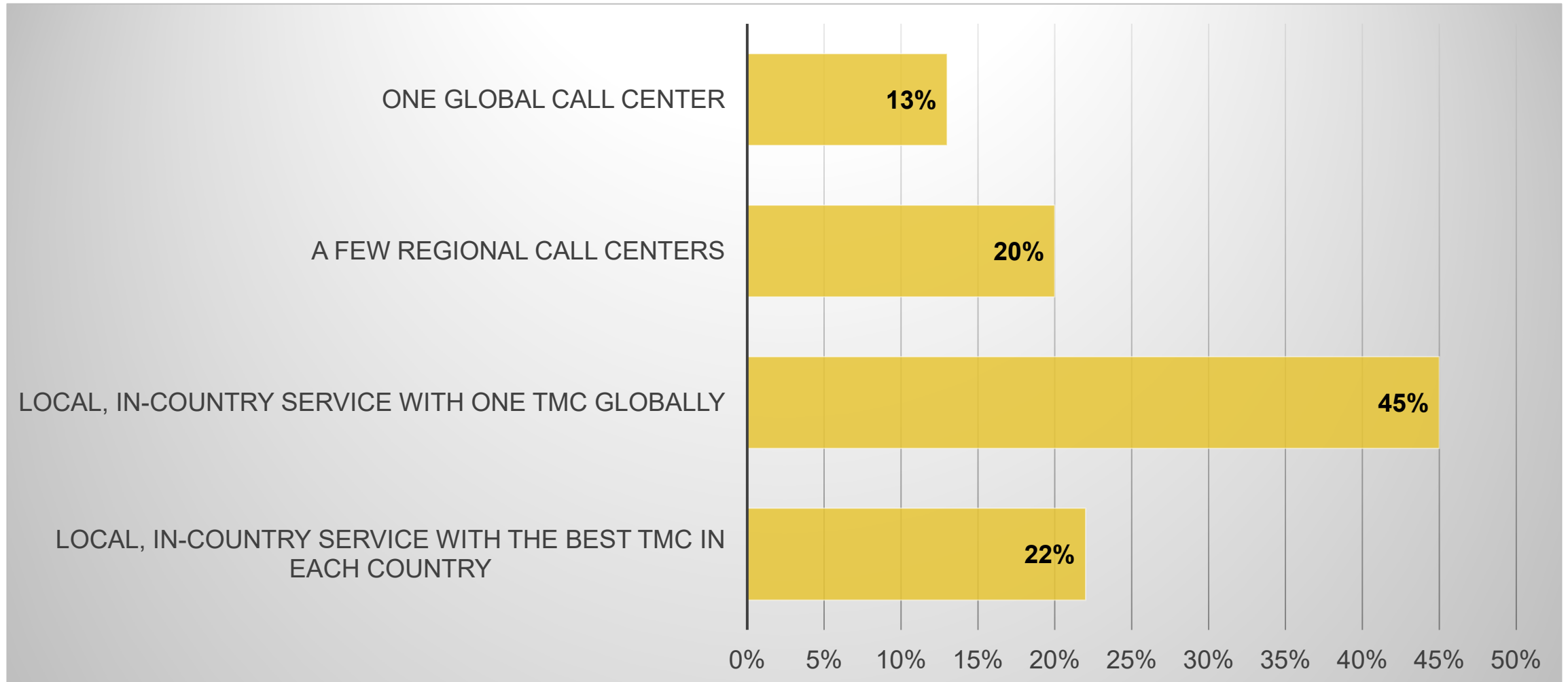
When was the last time you SOURCED, not ASSESSED your TMC?

5



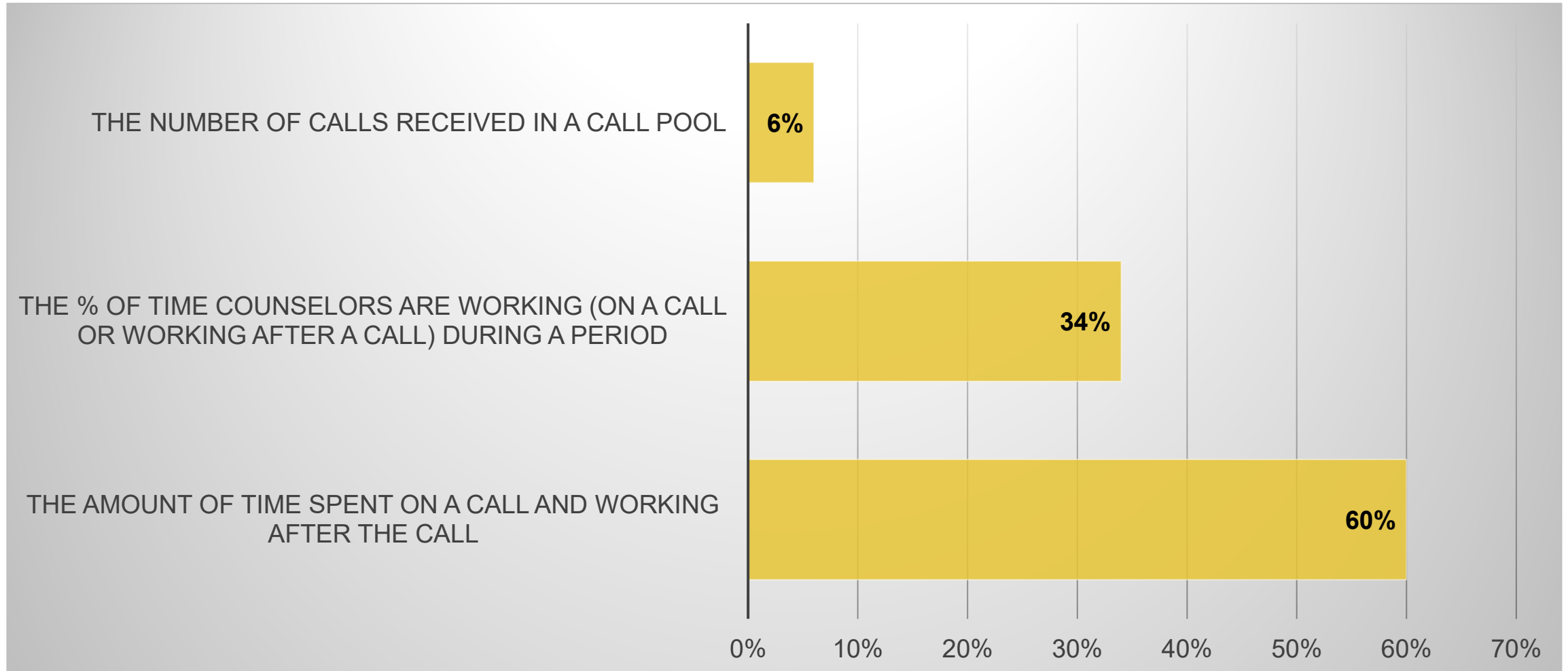
If I could design the perfect service model I would choose:

6

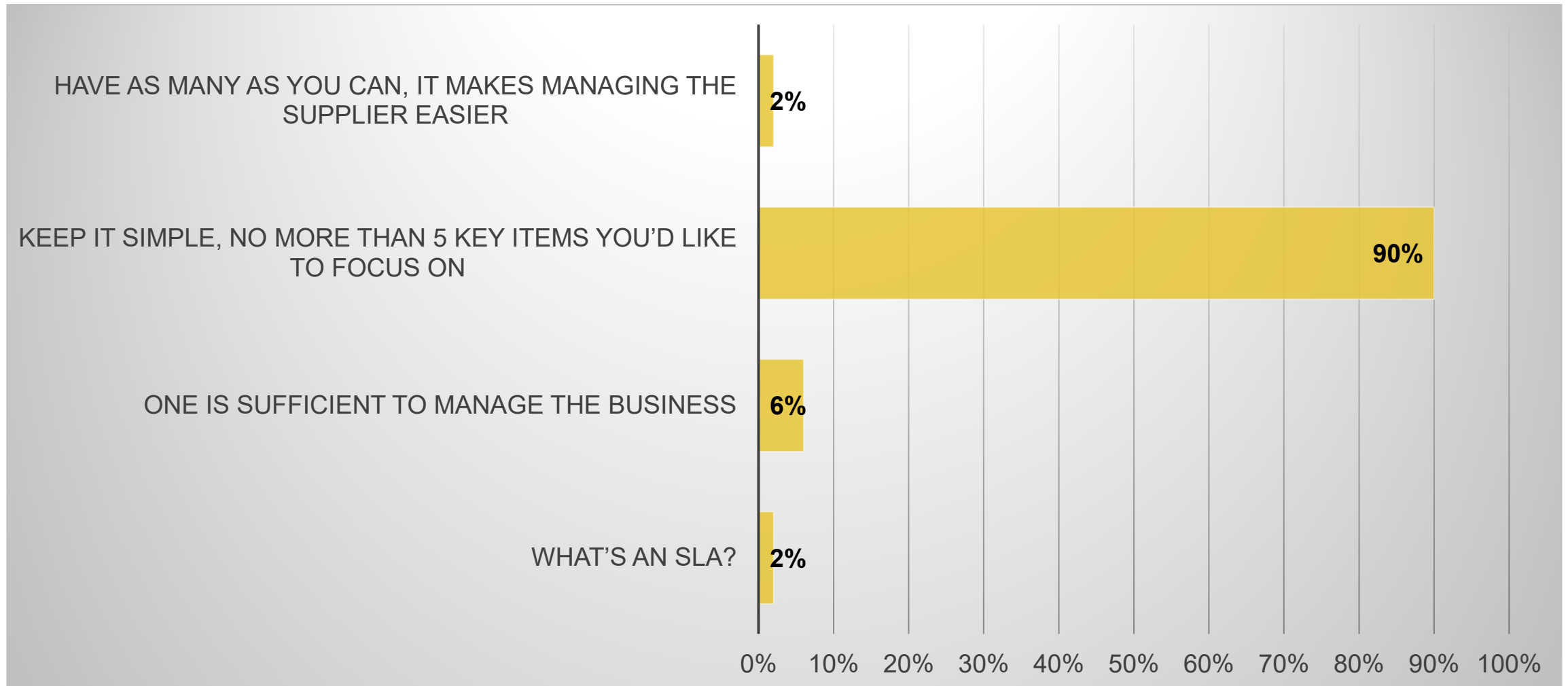


What has the greatest impact on achieving service levels at a reasonable cost?

7

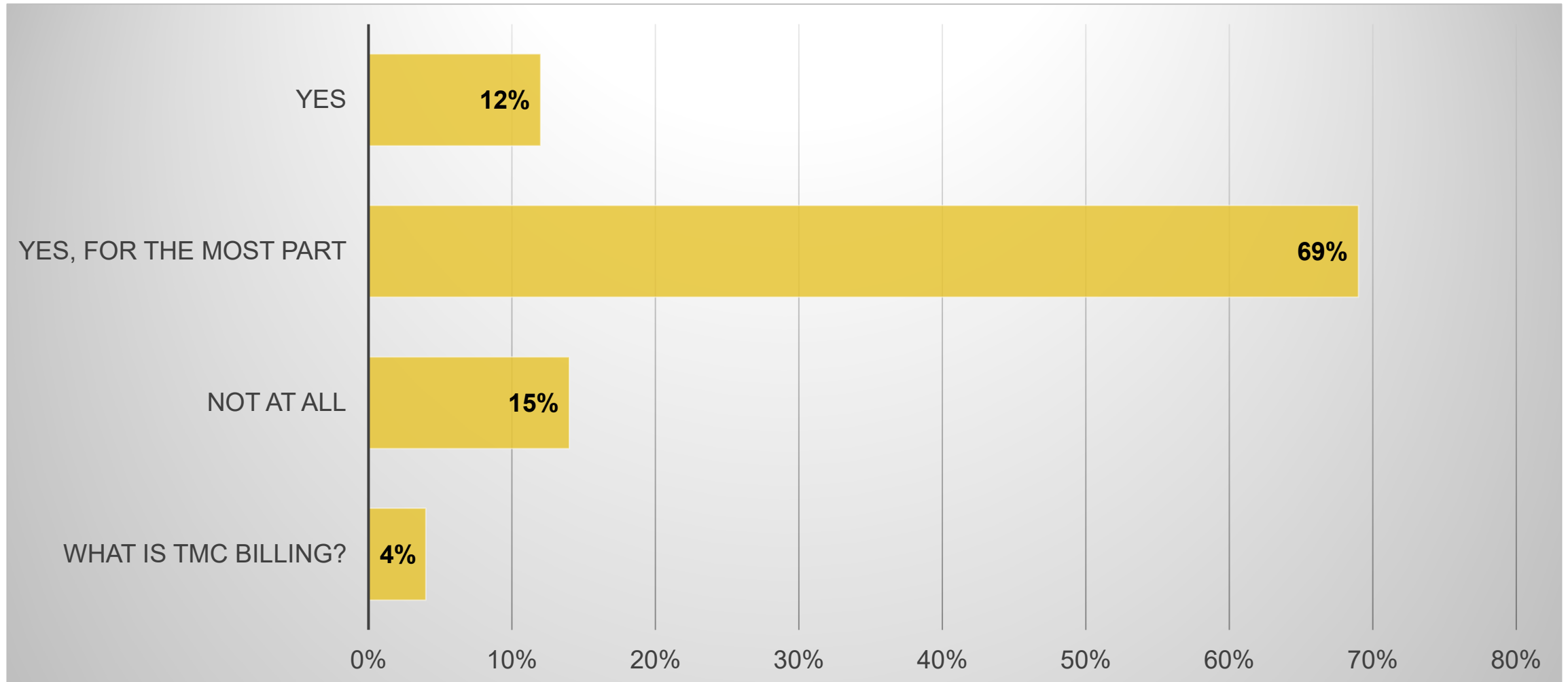


What is the right number of SLAs?



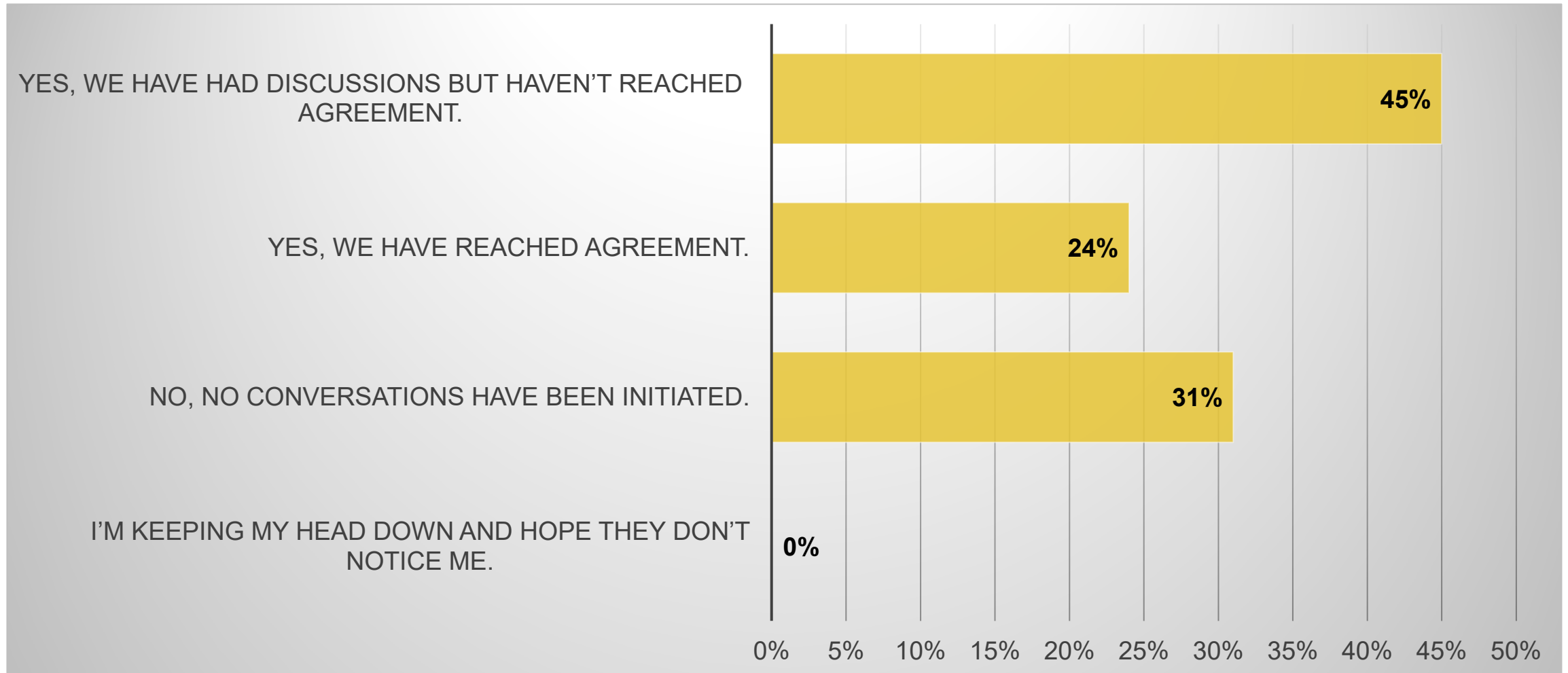
Do you feel that TMC billing is clear, well defined, easy to understand and auditable?

9



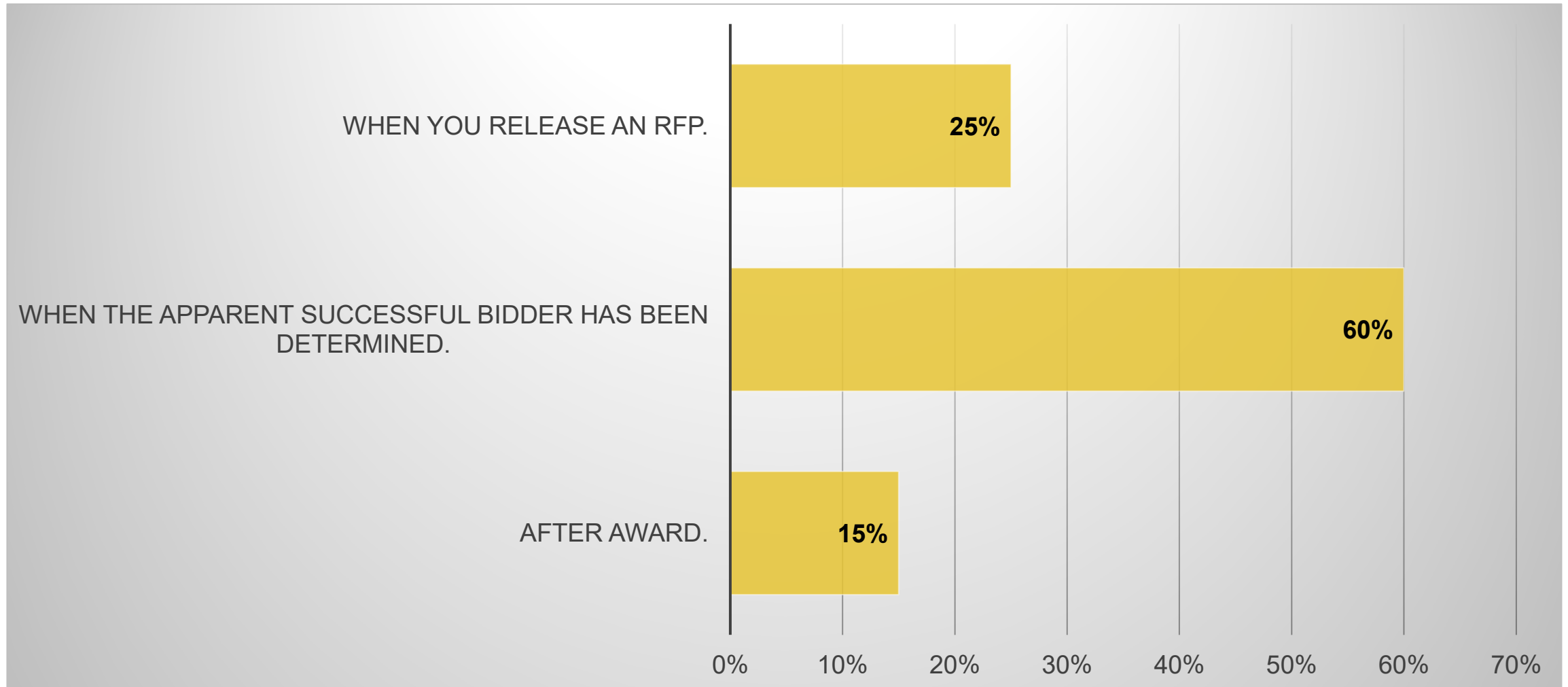
In the context of the COVID-19, have you had discussions about the financial terms and conditions of your contract with the intent to revise them?

10



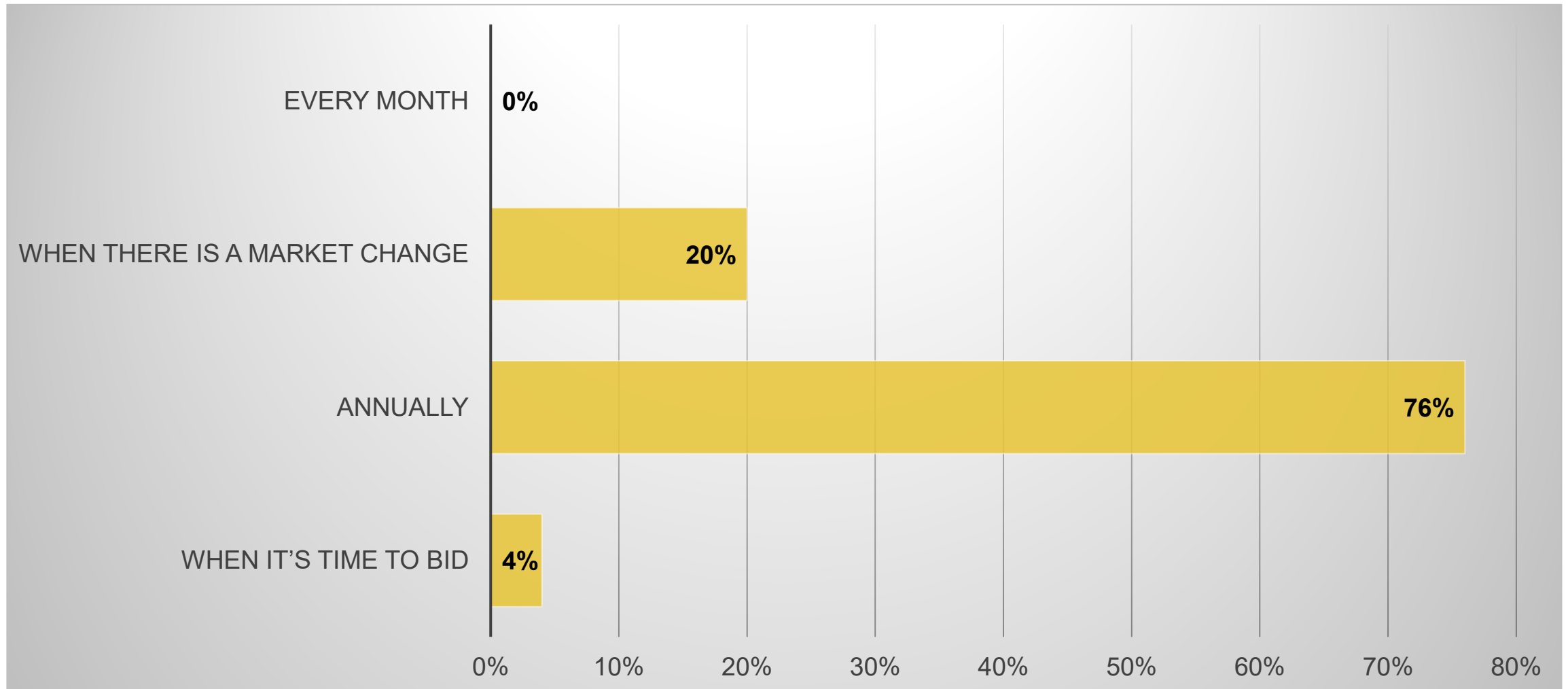
When is the best time to negotiate a contract?

11



How often do you think the contract should be reviewed:

12



How often should you review your business plan?

13

