Strategic Hotel Sourcing
Priorities for Corporations
April 2016
Foreword

A comprehensive survey is a map of a movement, an idea, or a concept on which so many of the data points can be marked “You are here.” This survey, made possible in conjunction with HRS, illustrates the challenges and obstacles faced by business travel managers in global hotel procurement.

It accomplishes two things. One) It illustrates how business travel managers have come to these obstacles; and the labour-intensive trade-offs they face in a purely savings-oriented travel management programme. Two) It depicts how pioneers in the traveller experience are getting a jump on the industry in boosting compliance and garnering additional savings.

Knowing where you are in an industry-wide movement is half of knowing where you need to be in a year or two. Eighty-four per cent of survey respondents acknowledged that savings will ultimately be achieved through demand management and compliance. Seventy-five per cent see improved traveller service as being key to savings in the future. The word is out and thoroughly accepted. Travel managers are ready to begin the transition to traveller centricity. The disconnect is with their companies, which regard savings as the ultimate travel management key performance indicator.

The shift to traveller centricity has been long and hard, despite the fact that ACTE educational programmes have been pushing this concept for the past two years. But no one expected a change on this scale to occur overnight. The trick is to begin incorporating traveller centricity into a travel policy without compromising savings. Many travel managers have done this. Another challenge is to free up the travel manager’s time and talent for more strategic planning. This survey is an invaluable tool in gauging where that time and talent is currently expended.

This survey, and the ACTE Global Conference in which it was presented, are components in a worldwide agenda linking the efforts of travel managers and business travellers to boost savings and compliance, while advancing the corporate objective. I’d like to extend my thanks to HRS, and to the 300-plus ACTE members who so generously contributed their time and data to this project.

Greeley Koch
Executive Director
Association of Corporate Travel Executives
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In 2015, a HRS study confirmed that companies struggle to manage the complexity of a diverse and highly fragmented hotel landscape and fear they lose out on substantial savings.

This year, HRS partnered with the Association of Corporate Travel Executives (ACTE) to drill deeper. A study conducted among more than 300 ACTE members examines three key areas:

- Approaches used by corporations to source hotels
- The impact on the travel manager’s role
- Consideration of the traveller experience

Strategic Hotel Sourcing: Priorities for Corporations reveals that inconsistent answers or delayed responses to request for proposals (RFPs) are two of the most prominent barriers to success when sourcing the right mix of hotels independently. The results also conclude that, without a doubt, the potential for finding additional savings when sourcing hotels is vast but the process is labour intensive. Travel managers that consider outsourcing reduce cost and win back precious time to focus on their travellers and duty of care. The strategic, outsourced approach to hotel sourcing is gaining global momentum and readers are rewarded with a few pointers on how to use sourcing to support company objectives.

We at HRS believe that by partnering with a sourcing professional companies can expect instant improvements to their hotel programme without having to compromise influence. Benefits include transparency, negotiation leverage, savings and, equally important, time to tackle strategic initiatives and engage with travellers. We hope you find this report valuable, and we’d be interested to hear your comments. Email us: corporate@hrs.com.

Tobias Ragge
CEO HRS
The research

In February – March 2016, HRS and ACTE conducted a web-based survey among over 300 corporate travel buyers around the world with responsibility for sourcing hotels.

Over two thirds of the survey respondents (67%) were based in North America, with just over a quarter (29%) from Europe, the Middle East and Africa. 4 per cent of the sample was based in the Asia Pacific region.

Almost half of the respondents (49%) have mature well-established programmes, while a further 25 per cent have mature programmes currently undergoing significant restructuring.

To add extra depth, ACTE followed up the quantitative research with a number of telephone interviews with corporate hotel buyers.

Who participated in the research survey: role in the organisation*

- Head of Travel: 35%
- Senior leader of the travel team: 21%
- Mid-level Manager: 23%
- Entry or support role: 20%
- Sole member of travel team / ‘Team of one’: 2%

Annual hotels spend for the last 12 months, including taxes and fees*

- Over US$ 25 million: 27%
- US$ 10m – US$ 25m: 19%
- US$ 5m – US$ 10m: 16%
- US$ 1m – US$ 5m: 22%
- US$ 500,001 – US$ 1m: 7%
- US$ 100,001 – US$ 500,000: 8%
- Less than US$ 100,000: 2%

* Numbers in chart rounded up to nearest per cent.
Executive Summary

Hotel sourcing is a global business
- Many (59%) corporations today use a central team to manage hotel negotiations. A fifth (20%) delegate hotel sourcing to local offices under the supervision of the central team. Just 8 per cent hand over responsibility for negotiating hotels to local offices.

Outsourcing helps many corporations manage complex sourcing ...
- Almost four out of ten (38%) corporations outsource the complexity of hotel negotiations to a third party.

...but most shoulder sourcing internally
- Almost two thirds (62%) of corporations keep sourcing in-house. Many rely on tools provided by their TMC to handle hotel negotiations – but around a quarter conduct this process manually.

DIY sourcing can make life harder for corporations
- Rising hotel prices are the single biggest barrier to travel buyers achieving their target rates: over half (53%) claim increasing hotel costs present a major barrier to getting their dream deal. For a further 6 per cent, this barrier is insurmountable.
- Time and manpower commitments associated with hotel negotiations are another obstacle: for 40 per cent of corporations, these create a major barrier.
- Over a third (35%) of buyers say slow or unresponsive hotels are a major barrier to achieving their target rate. Almost one in five (18%) say a lack of standard bidding processes is a major barrier.
- Outsourcing helps corporations address key pain points like unresponsive hotels: buyers who outsource are more than twice as likely to have no issues with ‘slow or no’ RFP responses than corporations who keep sourcing in-house (18% versus 8%).
- Corporations who outsource are three times more likely than non-outsourcers to say increasing hotel prices are not a barrier (10% versus 3%).

Most buyers turn a blind eye to the traveller experience
- Fewer than half (42%) of corporations track traveller experiences about hotels. Where they do measure traveller satisfaction, the focus is overwhelmingly on the choice of hotels, and not on traveller satisfaction with processes.
- One third of the corporations who actually track traveller experiences have no formal mechanisms to capture traveller feedback about hotels.

While travel buyers aspire to be strategic...
- Two thirds (66%) of buyers say they are often (52%) or always (14%) engaged with reporting on metrics linked to business strategy. Strategic initiatives to improve processes are often or always part of the travel buyer role for 64 per cent of respondents.
... in reality, the focus remains operational

- Almost nine out of ten (88%) buyers are often or always negotiating supplier savings. In corporations with annual hotel spends in excess of US$25 million, virtually all buyers (99%) find their role is often or always engaged with the operational task.

- The number one KPI for corporate travel buyers is their ability to achieve direct cost savings. 78 per cent say their performance is assessed on this. Only 39 per cent of buyers have their performance measured by metrics linked to business goals.

There’s a gap between what buyers do, and how they are measured

- While a small minority of corporations actively capture traveller feedback – many more use traveller experience KPIs to assess buyer performance. Just 14 per cent of buyers have formal processes in place to gather feedback – but 59 per cent of corporations use ‘traveller satisfaction’ as a buyer KPI.

“We outsource this - we just don’t have the time or bandwidth to do this ourselves”

Global Travel Manager, United States
A managed approach to hotel sourcing

Today, hotel accommodation accounts for US$320 million of travel spend. A managed approach to sourcing hotels can deliver real savings – but this mission is made complex and time-consuming by the nature of the global hotel marketplace.

For one, that marketplace is highly diverse and fragmented. Worldwide, there are hundreds of thousands of hotel properties. Many belong to global and regional hotel chains – but most do not.

This first section of Priorities in Global Hotel Sourcing asks corporate travel buyers with responsibility for hotels how they are getting to grips with this complexity. It explores what barriers are preventing buyers from achieving their ideal negotiated packages and looks at the tactics buyers are using to manage down cost and drive value from their hotel spend.

“Sourcing hotels is really intensive. Every year when we start the RFP process we say we’ll add fewer hotels – but then the business tells us we need them. We will go out to bid to maybe 2300 hotels and end up with 1200 hotels in our programme”

Head of Global Travel, Canada

Managing the complexity of hotel sourcing

Given the complexity of negotiating hotel programmes, many corporations choose to completely outsource the process of hotel negotiations. Almost four out of ten (38%) take this approach.

Corporations that keep sourcing in-house adopt a number of approaches. Most rely on tools, such as Lanyon, which are provided by their Travel Management Company (TMC). A significant number however choose to conduct negotiations manually. Around a quarter of buyers (24%) who added comments to the survey rely on phone calls and spreadsheets to manage hotel sourcing. For corporations with limited hotel requirements, this seems feasible: as one buyer notes “our programme is small and we can still manage it via email.”

How do corporations conduct hotel negotiations

Centralisation is the answer for many corporations

In contrast to the manual methods, corporations with complex and global hotel needs adopt more structured approaches. The research finds that 59 per cent of corporations use a central team to manage most or all of their negotiations. Among corporations with hotel spends in excess of US$25 million per annum, this figure rises to 64 per cent.

A significant proportion (20%) of corporations adopt a regionalised approach, whereby local offices can negotiate hotels under central supervision. Fewer than one in ten (8%) allow complete local autonomy.

While the vast majority of travel buyers favours centralised sourcing, geography and distance-related concerns are often complicating factors. Almost one in five (19%) buyers say a lack of local knowledge is a major barrier to them achieving their ideal hotel package.

Corporations headquartered in the EMEA region seem more inclined to flag up local issues as obstacles. Buyers in EMEA corporations are twice as likely than their counterparts in North America to regard a lack of local knowledge as a major barrier.
“We want to centralise – but we still rely on our local offices to tell us which hotels are keeping their promises about room rates.”

Global hotels lead, United States

Hotel behaviour often a source of frustration
Travel buyers identified a number of barriers that relate to hotels and how they engage with corporations. Top of the list of buyer concerns were rising hotels prices: over half (53%) identify these as a major obstacle to realising their ideal rate package. For a further 6 per cent this is an insurmountable barrier.

Buyers are also concerned about the amount of time and management resource consumed by hotel negotiations: for 40 per cent, this is a major barrier.

For many buyers, slow or non-standard hotel processes present challenges. A significant proportion (18%) cite the lack of standard bidding processes as a major barrier. Over a third (35%) encounter issues because hotels are slow to respond to RFPs – or fail to respond at all. For a small but significant 5 per cent of buyers, this issue makes it impossible to get their target rates packages.

“A year ago we started to globalise hotel sourcing. But it’s not all top-down. In our new model, the centre supports the regions – they bring us local insight. It’s the benefit of having someone with the knowledge and influence to extract the final five or ten Euros off the nightly room rate.”

Procurement Manager, United Kingdom
Outsourcing lowers the barriers for travel buyers

Outsourcing helps lower key barriers

Looking at the data from the perspective of buyers who outsource hotel negotiations reveals some interesting variances. Buyers who outsource seem much less likely to have their target deals disrupted. Almost one in five (18%) say ‘slow or no’ response from hotels is not a barrier to achieving their ideal rate, compared to just 8 per cent of buyers who use a tool or conduct negotiations manually.

Similarly, 10 per cent of outsourcers report that increasing hotel prices is not a barrier to achieving their dream rate, in contrast to just 3 per cent of non-outsourcers.
Travel buyers voice their frustrations

The time-consuming and labour-intensive process of negotiating hotel rates can generate frustration for buyers. The following buyer comments were collected during the survey and follow-up interviews conducted for Priorities in Global Hotel Sourcing.

“Hotels do not carefully read the requirements in the RFP and therefore don’t complete it properly and errors in the RFP hold up the evaluation process.”

“Hotel owners do not understand the value of long term customer relationships. Multiple rounds of negotiations waste time.”

“My job would be a lot easier if hotels had a standardized way of dealing with data. Some hotels continuously give us bad data – for example, they will fill in form in a way that suggests they don’t comply with local fire rules and that immediately means we can’t use them”

“I state my minimum requirements clearly, yet hotels and chains ignore them through the process.”

“Getting the correct negotiated rate loaded into the GDS can be a huge issue.”

“Hotel chains are not able to control local property pricing.”
Information is power – particularly when it comes to negotiation. How are buyers getting the information they need to analyse Strategic Hotel Sourcing: Priorities for Corporations.

Priorities in Global Hotel Sourcing asked buyers which sources they used to find this information. The most frequently cited source – by some distance – is the analysis of data from online booking engines provided by the TMC: 89 per cent of travel buyers use this information to analyse hotel costs.

Over half (56%) of travel buyers use company payment cards as a data source. 41 per cent scrutinise traveller expenses claims.

"When we have a personal relationship with the hotel – like the hotels we use locally – there’s no problem with RFPs. It’s more difficult globally, because we don’t have that personal connection."

Deputy General Manager Procurement, Singapore
Focus on the traveller

Traveller-centricity and the traveller experience have risen up the travel agenda, increasingly seen as the way to drive compliance and optimise travel spend.

Research conducted in 2015 for the ACTE report The Evolution of Travel Policy found corporate travel managers will look to traveller behaviour, rather than supplier cost reductions, to drive savings: 84 per cent say savings will be achieved through demand management and compliance in the next 1 - 2 years. Three quarters (75%) see improved traveller service as the route to savings. This section examines to what extent corporate travel buyers with responsibility for hotels have adopted the traveller-centric agenda.

Understanding traveller satisfaction

In spite of the growing focus on traveller-centricity, the research finds few buyers actively seek traveller feedback. Less than half (42%) track traveller satisfaction related to the hotel experience. Among the minority of buyers who do try to capture traveller sentiment, the focus is overwhelmingly on traveller satisfaction with the selection of hotels available for booking. This is tracked by 95 per cent of respondents.

Few travel buyers appear to monitor traveller satisfaction with key processes, such as those around selecting, booking and paying for hotels. Of the minority who measure traveller experience, just over half (54%) look at the booking process, while slightly over a quarter (26%) actively investigate satisfaction with the expenses process.

46 per cent of buyers measure traveller satisfaction with travel policy.

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Communicating with travellers
What formal mechanisms do you use to gather hotels-related traveller feedback?

- 54% We run our own standalone survey
- 43% We actively encourage travellers to give us feedback on each trip
- 33% We have no formal processes (but people can send me an email)
- 27% We lead traveller user groups on the company intranet
- 23% We run face-to-face events for gathering feedback
- 15% We include hotels questions in the company’s general employee satisfaction survey
- 8% We participate in user-led groups on the company intranet
Asked which mechanisms they use to gather hotel-related feedback, just over half (54%) of buyers favour standalone surveys. Many are open to using two-way methods of communicating with travellers. More than one in five (23%) hold town hall-style meetings, while 27 per cent lead user group communities on their company intranets. A further 8 per cent of buyers participate in user groups that are set up or led by their travellers.

However, one third (33%) of buyers have no formal mechanisms in place, instead relying on travellers to send an email or pick up the phone. As one survey participant put it: “My travellers know how to reach out to me or to my team with comments.”

The traveller experience is key to savings – but without strong communication channels and means to capture traveller sentiment, it is difficult to see how travel managers can drive improvements in the traveller experience.

“To some extent I use traveller behaviour as a guide to traveller satisfaction – if my travellers are complying then they are happy with the hotel choices. They’re voting with their feet.”

Global Travel Leader, United States

Duty of Care

Duty of Care is a topic of growing concern for managed travel as corporations strive to reduce traveller risk and improve traveller peace of mind.

Accommodation is an area of particular focus, with the security of hotel properties a key issue for corporations and travellers alike. Priorities in Global Hotel Sourcing asked hotels buyers how Duty of Care considerations impact their hotel policy.

The research found that 9 per cent of corporations have changed their policy with respect to Duty of Care over the last 1 – 2 years. One area of concern is sharing economy accommodation options, with travel buyers citing concerns about vetting properties.

Looking ahead, a further 9 per cent intend to adapt policy within the next 2 years, for example, by implementing a formal Travel Risk Management (TRM) programme.

However exactly half (50%) of the buyers who participated in the research have no plans to change policy. Commenting on their survey answers, several travel buyers say their companies’ employee health and safety policies are sufficiently robust to require no further adaptation.

Given the currency of Duty of Care and traveller safety, it is surprising that one in ten (10%) corporate hotel buyers claim to have no formal policy in place.
The role of the travel buyer

Travel buyers play a critical and multi-faceted role as they seek to balance and achieve traveller and business objectives.

Typically, this multifaceted role can include setting the overall direction for hotels, achieving best value for money, ensuring the hotel programme meets the expectations and needs of travellers, and making sure the company fulfils its Duty of Care obligations to its employees.

In this section, the Priorities in Global Hotel Sourcing research focuses on the hotel buyer’s role, looking at how they spend their time and the demands placed on them by managing hotel negotiations.

“Our hotel programme is a work-in-progress. When I started we didn’t have a strategy and there was no analytical thought about where and how sourced hotels.”

Global Travel Manager, United States

| How do travel buyers spend their time? To what extent do they focus on the following policy activities? |
|-------------------------------------------------|----------|--------|--------|--------|
| Negotiation with suppliers to achieve savings    | Never    | Sometimes | Often | Always |
| Reporting on metrics liked to business strategy  | 6%       | 28%     | 52%   | 14%    |
| Streamlining and modernising processes or procedures | 2%       | 33%     | 53%   | 11%    |
The strategic contribution

The data suggests that many corporate travel buyers strive to make a strategic contribution to the business. Over half (52%) often report on metrics linked to corporate strategy. A further 14 per cent say this is something they do all the time.

Linked to this strategic aspiration, many buyers concentrate on initiatives that aim to make the organisation, and its employees, more efficient. 64 per cent are often or always at work to streamline procedures and introduce more frictionless processes.

However, the commitment of time and resources associated with sourcing hotels may mean travel buyers cannot devote as much time as they would like to strategic initiatives. Almost a quarter (22%) are spending time every day negotiating savings with suppliers: two thirds (66%) are often engaged in this activity.

Buyer seniority and size of hotel spend seem to offer no relief from this operational burden: over a quarter (26%) of Heads of Travel say they are ‘always’ engaged with supplier cost negotiations. Meanwhile, one third (33%) of buyers in corporations with an annual hotel spend in excess of US$25 million do this every day. Virtually all (99%) buyers in these corporations are often or always engaged in negotiating supplier savings.

Travel buyer KPIs send mixed messages

Are hotel buyers recognised by their employees as strategic players in the business? Looking closely at buyer KPIs reveals some interesting mismatches. For one, the leading buyer KPI – used in 78 per cent of corporations - is based on the ability to drive direct savings on items like ticket prices and hotels rates.

Which criteria are used to measure the travel buyer’s performance?
Yes, corporations use strategic KPIs – but these lag far behind direct cost savings. For example, 61 per cent of buyers are measured on their ability to deliver ‘indirect’ savings off the back of initiatives to improve business processes.

Diving into the data, while two thirds of buyers say reporting on business metrics is often or always part of their role, only 39 per cent have their performance measured against their corporation’s strategic business objectives.

Further mismatches emerge around traveller feedback. As noted previously, just 42 per cent of buyers actively gather traveller feedback about hotels. Of this number, one third have no formal mechanisms in place to collect feedback. Yet traveller experience criteria are frequently used as buyer performance KPIs. Well over half of buyers (59%) are measured on their ability to drive traveller satisfaction and minimise traveller complaints.

There’s a similar picture when it comes to buyer-led initiatives to improve processes. Almost two thirds (64%) of buyers claim to always or often be occupied streamlining or modernising procedures and workflows. But most do not gather the kind of traveller feedback-driven insights they need to drive successful change. Without these insights, they are operating in the dark.

### Buyers shut out of policy planning

| How do travel buyers spend their time? To what extent do they focus on the following policy activities? |
|-------------------------------------------------|---------------------------------|-----------------|----------|
|                                                 | Never  | Sometimes | Often | Always |
| Communicating on policy                         | 5%     | 41%       | 49%   | 5%     |
| Monitoring and enforcing policy                 | 3%     | 27%       | 54%   | 17%    |
| Training travellers on policy                   | 9%     | 43%       | 42%   | 6%     |
Policy is the heart of managed travel. Strategic Hotel Sourcing: Priorities for Corporations ask to what extent travel buyers are driving policy for their organisations.

Yes, a relatively small proportion of buyers play a proactive role: one in ten (8%) is always involved in proposing ideas for changing policy. Just under one in five (19%) always make the final decision when it comes to policy changes. And a fair proportion (66%) of buyers are often or always involved in policy discussions with other departments.

But it is more common to find buyers shut of policy: half (50%) are never or only rarely involved in discussions about policy planning with external travel partners. Almost half (43%) never or rarely get to make the final decision on policy proposals, and over a third (37%) rarely or never see their own ideas about reforming policy implemented.

Given the fairly strong likelihood their ideas will not be heeded it is perhaps unsurprising that 43 per cent of travel managers rarely or never propose new policy ideas. Which raises the question: how can travel managers evolve their role into strategy if they are not coming forward with initiatives?
Opportunities to drive change

Increasing their focus on the traveller experience can help corporate hotels buyers drive policy compliance and achieve the kinds of direct savings on which their performance is measured.

This section dives into the findings from the Priorities in Strategic Hotel Sourcing: Priorities for Corporations research to identify opportunities for buyers to drive change.

• **Measurement is the key to managing improvement**
  Travel buyers understand traveller focus is the route to direct and indirect savings: 84 per cent say savings will be achieved through demand management and compliance in the next 1 - 2 years. Yet, when it comes to hotels, it seems most buyers do not have the traveller insights they need to improve the traveller experience.

  Clearly, hotel buyers need to deal with the measurement gap and start to collect the traveller data that will allow them to drive improvements.

• **Buyer KPIs should more closely align with the business**
  Instead of focusing on strategic initiatives that support the traveller and the business, hotel buyers are preoccupied with labour-intensive hotel negotiations. Almost nine out of ten (88%) of buyers are often or always negotiating with suppliers.

  Today, buyer performance is measured on their ability to drive direct savings. As long as buyer KPIs are focused on these operational measures - rather than more strategic topics like process improvement and traveller experience - buyers will struggle to change how they are perceived.

• **Outsourcing lowers the barriers to better results**
  Many obstacles stand between buyers and their dream hotel deals. Outsourcing this time-consuming task allows buyers to tackle some of the key pain points. Almost one in five (18%) buyers from corporations who outsource say ‘slow or no’ response from hotels is not a barrier, compared to just 8 per cent of buyers conduct negotiations themselves. These outsourcers are three times more likely than non-outsourcers to say increasing hotel rates are not a barrier.

  There are golden opportunities for corporate hotel buyers to seize the initiative and drive change for their organisations and travellers. With accommodation costs now the single largest item in corporate travel budgets, they have the potential to make a big impact.
For more information:

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About the Association of Corporate Travel Executives (ACTE)
The Association of Corporate Travel Executives is a non-profit education and research organization serving the global business travel industry in 51 countries. Since 1988, ACTE has provided unique programs for travel managers and innovative policies that improve conditions for business travellers, while substantially increasing corporate revenue. ACTE currently leads the business travel industry with 75 events worldwide, managed through offices in Asia, Australia, Canada, the U.S. and Europe, with representation in Latin America, South America, and Africa. No other travel trade association can make that claim.

About HRS - Global Hotel Solutions
HRS offers end-to-end hotel management solutions to more than 3,000 businesses globally. Offering its customers individual consulting and bespoke solutions, clients include global players from the Fortune 500 companies such as Google, China Mobile, Hitachi, Huawei, Alibaba and Panasonic.

As well as providing professional hotel procurement services and negotiating special rates with hotels, HRS optimises the cashless and paperless payment of hotel stays, whilst offering automated invoice processing. In addition, HRS provides solutions for meeting and group bookings through a standardised online booking tool which completes the offer for companies. With over 300,000 hotels in 190 countries, HRS offers hundreds of hotel chains and approximately 180,000 independent hotels. HRS Global Hotel Solutions has exclusive access to all global distribution systems (GDS) worldwide. Offering more than five million rooms in individual hotels, HRS is today the world’s largest hotel content provider. Furthermore, corporate customers benefit from the HRS Business Tariff which is available in 40,000 hotels and offers up to 30 per cent discount off the daily online hotel price.

The continuously expanding group of companies has over 1,500 employees in 25 offices worldwide, among them Shanghai, Tokyo, Singapore, Paris, London, Mumbai, São Paulo and New York. The HRS Group’s headquarters are located in Cologne. Further information can be found under http://corporate.hrs.com.