Traveller Centricity

The Evolution of Travel Policy
A Global View on the Future

A research white paper from

ACTE GLOBAL — ASSOCIATION OF CORPORATE TRAVEL EXECUTIVES

AMERICAN EXPRESS — GLOBAL BUSINESS TRAVEL

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The Evolution of Travel Policy: A Global View on the Future is the year's definitive study on how Corporate Travel Managers around the world are responding to the continuing shift in the balance between savings and service.
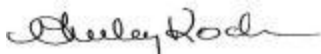
Throughout 2015, the Association of Corporate Travel Executives (ACTE) put Traveller Centricity – one of ACTE's Five Education Pillars - in the spotlight as one of the most influential trends impacting corporate travel policy. This report benchmarks how corporations currently address a range of traveller considerations, and looks ahead to the changes that companies around the globe will be making to their managed travel programmes within the next 1 - 2 years.

While savings and safety remain dominant drivers of policy, this report details the levers that travel managers are using to improve traveller experience without sacrificing either of those goals. Several key areas rose to the forefront including duty of care and traveller services, i.e., sharing economy options, alternative booking channels, and communication platforms.

These valuable insights will help prepare you to keep pace with the evolving industry policy standards, so you can position your organisation to match or exceed the industry's standards and keep your company competitive in the years to come.

ACTE acknowledges the generous support from American Express Global Business Travel (GBT) for recognising the strategic importance of this topic. Through the support of GBT's Global Access Partnership, ACTE was able to conduct in-depth focus group research, generate robust survey questions, and gather extensive data from over 350 corporate travel managers around the world.

ACTE would also like to thank the corporate buyers and travel managers who provided their insights and made this project truly representative of our global community.

Executive Director
Association of Corporate Travel Executives

> " Yes, there is still certainly potential to get savings – but we have to work on it. We have good discounts in place – but traveller behavior is the last frontier. "
>
> — Director & Category Manager, Financial services group, Canada

The Evolution of Travel Policy: A Global View on the Future charts the evolution of travel policy, exploring the experiences, priorities, and best practices of Corporate Travel Managers around the world. Below is a quick digest of the key conclusions.

The past: the balance between savings and service weighed towards savings

- Savings has been the primary driver of corporate travel policy over the last 1 – 2 years. Over half (52%) of Corporate Travel Managers surveyed agree that savings drove the evolution of policy in their organisation, while just 16% cited traveller service.

- Policy tightened across a number of areas. Responses show the primary area for reduced flexibility was the use of alternate booking channels (seen by 32% of respondents) followed by advance purchase requirements (seen by 27%) and premium versus economy seating (seen by 21%).

The future: the balance begins to shift as organisations consider improvements to traveller service

- Looking over the next 1 – 2 years, the substantial majority of respondents (84%) believe achieving savings will be a question of demand management and ensuring compliance.

- Policy remains a key lever for savings: 24% of Corporate Travel Managers surveyed expect policy around advance purchase requirements to become less flexible. 19% anticipate tightening of policy on the use of alternative booking channels.

- According to 75% of survey respondents, improvements to traveller service can lead to savings based on changes in traveller behaviour.

Initiatives for improved traveller service: message-based services and mobile booking find favour; sharing economy options are not yet being widely pursued.

- 30% of Corporate Travel Managers surveyed have deployed pre-trip messaging – and 31% plan to introduce it in the next 5 years. 23% have implemented in-trip messaging, and 32% aim to introduce it.

- Mobile booking has been deployed in 29% of respondents' organisations. 30% of Corporate Travel Managers surveyed plan to implement it within the next 2 years.

- 26% of respondents have implemented – or plan to implement – policy for ground transportation from the sharing economy sector. 21% have introduced, or plan to introduce, sharing economy accommodation options – but 56% completely rule out adding these accommodation options to policy.

- 45% of Corporate Travel Managers surveyed say they have not received any requests from their travellers to include sharing economy options in policy.

Justifying the value of traveller service improvements: Corporate Travel Managers look for more sophisticated metrics

- Most respondents (75%) rely on traveller feedback, via ad hoc emails or surveys, to capture traveller satisfaction.

- But data-based measures are now making their mark: 21% of Corporate Travel Managers surveyed use travel productivity metrics today, and 16% want to introduce in the next 1 – 2 years.

- There's a strong appetite for more sophisticated metrics: 51% of respondents call out 'introducing Total Cost of Travel' policy as the top wish list item for the next 1 – 2 years.

No complacency about compliance: dialogue and education viewed as keys to better improved compliance and traveller satisfaction. Corporate Travel Managers target digital user communities

- 72% of Corporate Travel Managers surveyed believe they have more work to do to achieve their desired compliance level. A further 12% believe they have a lot more work to do to reach their goal.

- Today, 10% of respondents give travellers basic information about their travel spending. Over the next 1 – 2 years, 20% aim to give travellers a complete personal dashboard report.

- 44% of respondents' organisations have no formal systems in place for gathering traveller feedback. Today, 22% of respondents lead a user group community, and 13% participate in communities. 42% want to set up a user group to improve communication: this comes Number Two on Corporate Travel Managers' 'Policy Wish List'.

Duty of care is firmly embedded on the Corporate Travel Manager's agenda - and a part of daily life for travellers

- 55% of Corporate Travel Managers surveyed educate travellers about their employer's obligations to them under duty of care guidelines and regulations.

- 47% have third-party specialists to educate travellers about higher-risk destinations, and 27% have introduced new or additional training for these travellers.

- 20% have introduced new processes, like emergency SMS messaging systems, for in-trip communication.

> " Over the last two years we've focused on savings via very strict policy compliance, which we've managed on a global basis. Our people need to travel more and compliance lets us do more travel while maintaining cost. "
>
> — Global Travel Manager, UK
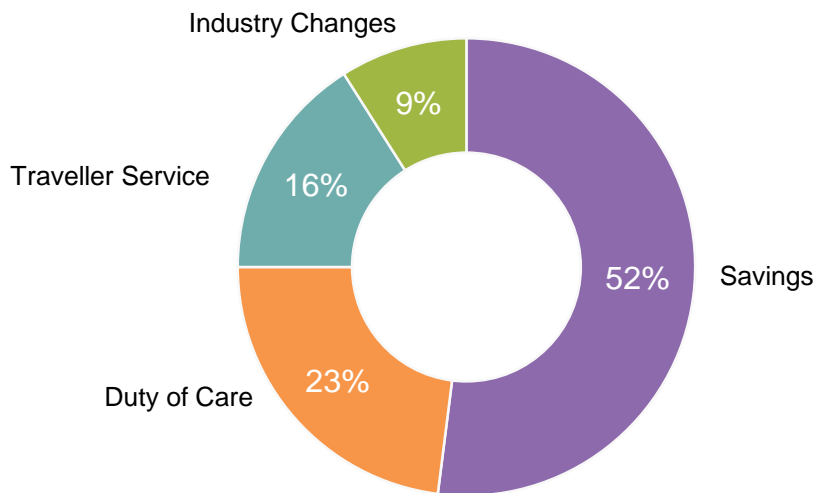
Chart 1: What drove the evolution of policy over the last 1 – 2 years?

Before attempting to predict the future evolution of corporate travel policy, it makes sense to understand where the industry stands today and how it arrived here.

Asked to look back over the last 1 – 2 years, respondents describe a policy environment shaped by savings. Over half (52%) confirm that saving money was the primary driver of travel policy in their organisation through this period. In fact, savings was the number one priority by some distance, substantially ahead of duty of care (23%) and moves to improve the traveller experience (16%). This statement held true regardless of programme maturity levels (developing versus well-established programmes).

So how have Corporate Travel Managers been using policy to realise savings? For simplicity, the findings are presented in two parts: policy addressing booking, and policy addressing other parts of the trip experience.

Policy and booking

Booking: How has your company's travel policy evolved over the last 1 – 2 years?

	Less flexible	More Flexible	Stayed the same	No policy
Usage of alternate booking channels	32%	6%	55%	7%
Advance purchase requirements	27%	5%	61%	7%
Allowing upgrades	19%	10%	58%	13%
Premium versus economy seating	21%	21%	50%	8%

For many organisations, policy across these key practices appears stable over the last 1 – 2 years. Where there was movement, Corporate Travel Managers reported a tendency to reduce flexibility. This was particularly marked on the use of alternate booking channels. Here, almost one third (32%) of respondents saw policy become more restrictive.

Policy on advance purchase requirements and allowing upgrades also saw tightening, in over a quarter (27%) and almost a fifth (19%) of organisations respectively.

On premium versus economy seating, over a fifth (21%) of respondents reported less flexibility. However, exactly the same proportion saw more flexibility here.

While there were examples of looser policy across every area of booking policy, the numbers suggest that the overall direction is towards less flexibility.

Policy and the trip experience

Post-booking: How has your travel policy evolved over the last 1 – 2 years?

	Less flexible	More flexible	Stayed the same	No policy
Lounge access	9%	4%	58%	29%
Personal use of loyalty programmes	7%	7%	78%	9%
Reimbursement for ancillary fees	10%	12%	65%	13%
TSA Pre-check or similar vetting	9%	17%	43%	31%

Looking back over policy applied to non-booking elements, the research again suggests a high level of policy stability.

There was some movement towards more flexibility on reimbursement for ancillary fees, perhaps linked to the recent arrival of these added value travel options. Within an overall picture of stability (65% of respondents say policy stayed the same), just over one in ten Corporate Travel Managers reported a loosening in policy on ancillary reimbursements.

On policy around security vetting systems, such as TSA Pre-check in the United States, almost one in five (17%) of respondents' organisations have introduced more flexible policy within the last two years. Perhaps surprisingly, given the growing focus on travel security, almost a third (31%) of respondents report that their organisation does not have a policy around the use of security pre-vetting services.

"There's still a savings opportunity. Booking tools are a big opportunity – but education is important. There's lots of scope to get self-bookers to book smarter.

—Travel Administration Manager, Canada

The next section looks forward, exploring how Corporate Travel Managers expect to use policy in the next two years.

The numbers strongly suggest that the future policy environment will continue to be shaped by savings. That said, respondents think they will need to shift focus to achieve these savings. Almost half (45%) believe there is no scope left to achieve savings from negotiated deals. For most (84%), winning savings over the next 1 – 2 years will be about demand management and gaining compliance. This signals a major shift in how Corporate Travel Managers approach policy, away from controlling supplier costs and towards managing traveller behaviour.

Policy and booking

Booking: How will your company's travel policy evolve over the next 1 – 2 years?

	Less flexible	More flexible	Will stay same	No policy, will add	No policy, no plans
Usage of alternate booking channels	19%	11%	60%	6%	3%
Advance purchase requirements	24%	5%	61%	7%	3%
Allowing upgrades	15%	10%	63%	6%	6%
Premium versus economy seating	15%	15%	59%	7%	3%

"Significant savings are a thing of the past. Now it's about cost avoidance. I've already bled the turnip. Now it's about getting more compliance to the programmes so we can realise the negotiated savings.

— Global Travel Manager, USA

Looking ahead, the first impression is one of stability. Across every booking policy category the number one option is 'no change'.

However, some responses stand out. Almost one quarter (24%) of Corporate Travel Managers surveyed expect policy to tighten on advance purchase requirements. Usage of alternate booking channels is another area where a significant proportion (19%) of respondents anticipates policy tightening, while 15% believe the upgrades policy will become less flexible.

As was the case in the past 1 – 2 years, equal proportions (15% each way) of Corporate Travel Managers surveyed expect to see policy on premium versus economy seating become both more and less flexible.

The respondents who report to Procurement / Strategic Sourcing are more likely to anticipate tighter policy than the general population of respondents. This is most marked with advance purchase requirements (30% versus 24%), premium versus economy seating rules (19% versus 15%), and the use of alternate booking channels (23% versus 19%).

Policy and the trip experience

Post-booking: How will your travel policy evolve over the next 1 – 2 years?

	Less flexible	More flexible	Will stay same	No policy, will add	No policy, no plans
Lounge access	8%	7%	65%	5%	14%
Personal use of loyalty programmes	8%	8%	77%	3%	5%
Reimbursement for ancillary fees	12%	10%	66%	7%	5%
TSA Pre-check or similar vetting	6%	14%	60%	12%	11%

When it comes to the future of policy and the trip experience, the outlook is again largely stable. On every category around two thirds of Corporate Travel Managers surveyed expect 'no change' over the next 1 – 2 years.

Where movement is expected, some interesting patterns emerge. On the reimbursement of ancillary fees, respondents anticipate a reversal of the past situation. Over the next two years, slightly more Corporate Travel Managers surveyed expect policy on ancillary reimbursement to tighten.

Meanwhile on TSA Pre-check and security vetting, expectations tend towards increasing flexibility: 14% of respondents look forward to a looser policy regime, while 6% expect less flexibility.

> " *Our drivers are about using technology to ease traveller stress, e.g., allowing travellers to upgrade and take advantage of new ancillary services on airlines like seat upgrades. In the US, availability can be an issue – and to help our travellers we give them flexibility.* "
>
> — Corporate Travel Services Manager, USA

Substituting technology for travel

Over the last two years, three quarters (75%) of Corporate Travel Managers surveyed saw policy on using remote conferencing technology in lieu of travel stay the same or become more flexible. Only 18% tightened their policy on the use of technology to replace travel over this time.

Looking ahead, 14% plan to make their policy on substitution more flexible. 15% plan to make it less flexible while just over half (51%) will leave their policy unchanged.

" *Savings and service should not be mutually exclusive. We can still find savings while we're delivering service. Sometimes the discussion is about explaining that we're achieving savings, and that our decisions about policy are getting results – and then the light bulb goes off for travellers, and they understand what we're doing.* "
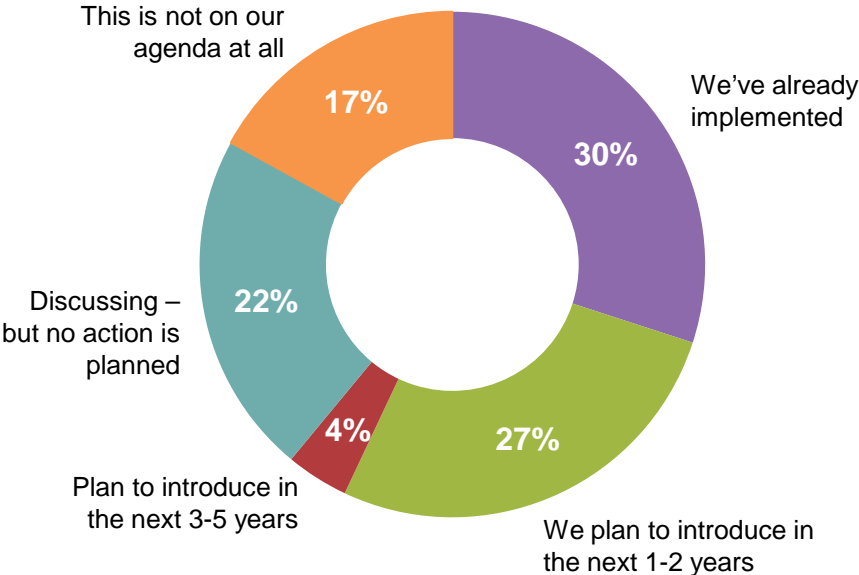
— Global Travel Manager, USA

In an environment where savings will be driven by traveller behaviour and compliance, Corporate Travel Managers and Buyers are looking to improved traveller service as the way to unlock savings. Three quarters (75%) of respondents agree that traveller service improvements can lead to savings. And, according to most, there does not need to be a downside in terms of cost: 72% do not agree that traveller service improvements come at the cost of higher expenses and in-trip costs.

This section of *The Evolution of Travel Policy* asks Corporate Travel Managers how they plan to improve traveller service. After examining specific initiatives, the survey explored how Corporate Travel Managers are justifying investments in traveller service to their senior management.

What's on the radar?

Prior to the quantitative survey for this report, several Corporate Travel Managers took part in a focus group where they identified the primary traveller service initiatives on their agenda: pre-trip messaging, in-trip messaging, apps and mobile booking. Survey respondents were asked to reveal their future plans across these areas.

Pre-trip messaging

This is not on our agenda at all

17%

We've already implemented

30%

Discussing – but no action is planned

22%

We plan to introduce in the next 1-2 years

27%

4%

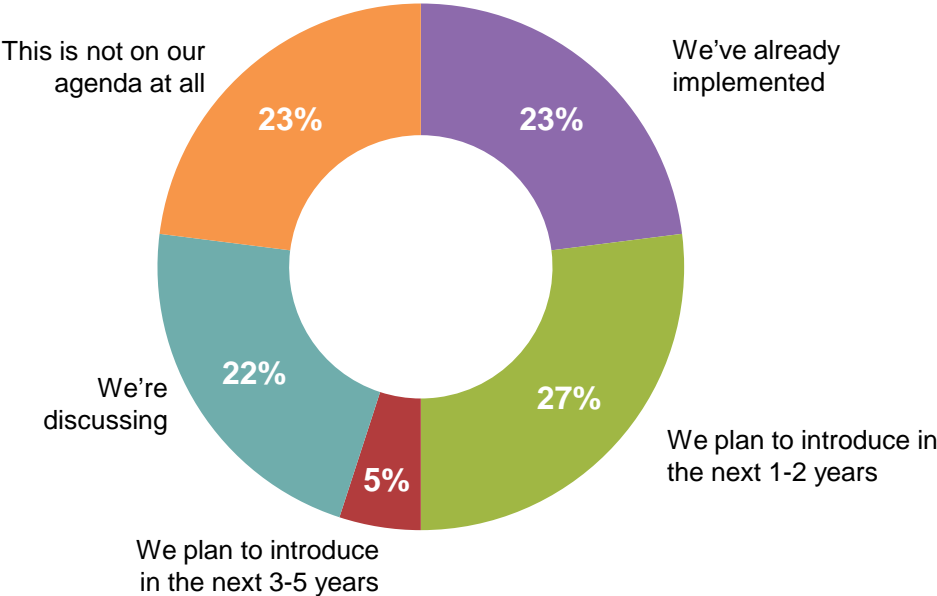Plan to introduce in the next 3-5 years

Chart 2: Pre-trip messaging

Giving travellers up to date information before they travel appears an attractive way to boost service. Almost one in three (30%) Corporate Travel Managers surveyed have already implemented some form of pre-trip messaging, while over a quarter (27%) want to introduce pre-trip services over the next 1- 2 years. More than half (53%) of mature, well-established travel programmes have already implemented pre-trip messaging.

In-trip messaging

In-trip messaging is another example of how organisations can communicate to improve traveller service. Less then a quarter (23%) of respondents have deployed in-trip messaging. For 27%, implementation of in-trip messaging is fairly imminent (within the next 1 – 2 years). For a further 5%, implementing these services seems to lie in the future. Forty percent of mature, well-established travel programmes have already implemented in-trip messaging.
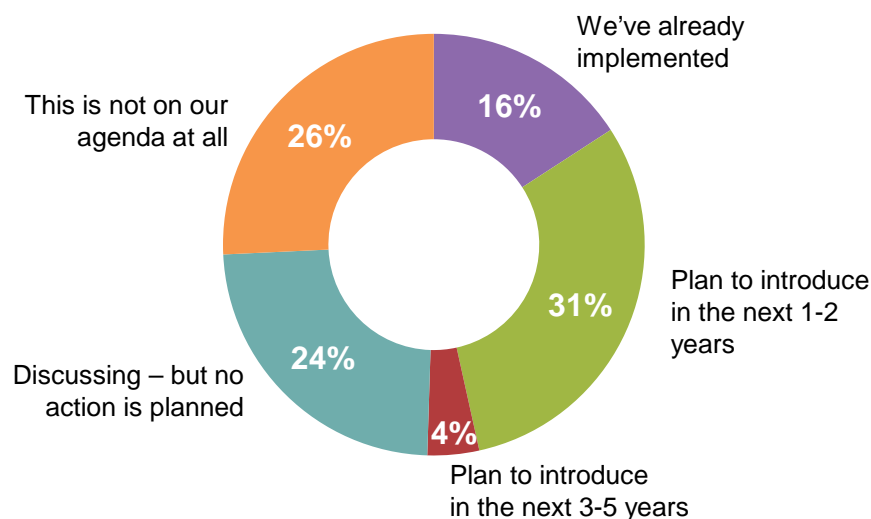
Chart 3: In-trip messaging

- This is not on our agenda at all — 23%
- We've already implemented — 23%
- We plan to introduce in the next 1-2 years — 27%
- We plan to introduce in the next 3-5 years — 5%
- We're discussing — 22%

Travel management apps

Pie chart segments:
- We've already implemented — 16%
- Plan to introduce in the next 1-2 years — 31%
- Plan to introduce in the next 3-5 years — 4%
- Discussing – but no action is planned — 24%
- This is not on our agenda at all — 26%

Chart 4: Apps for in-trip changes

Corporate Travel Managers seem intrigued by the potential of apps to improve the travel experience. Over a third (35%) of respondents have plans in place to introduce apps that allow travellers to change their booking in-trip; 31% want to make this happen within the next 2 years.

However, real world implementations are relatively scarce; only 16% of organisations surveyed have introduced apps. That number is higher among mature, well-established programmes; 26% have already introduced apps for in-trip changes. Over a quarter (26%) of survey respondents are not even considering them.

Would company bans on downloading apps to traveller devices inhibit introduction plans? Not necessarily: over a third (38%) of organisations surveyed do not restrict downloads, and 19% plan to make their existing policy more flexible.
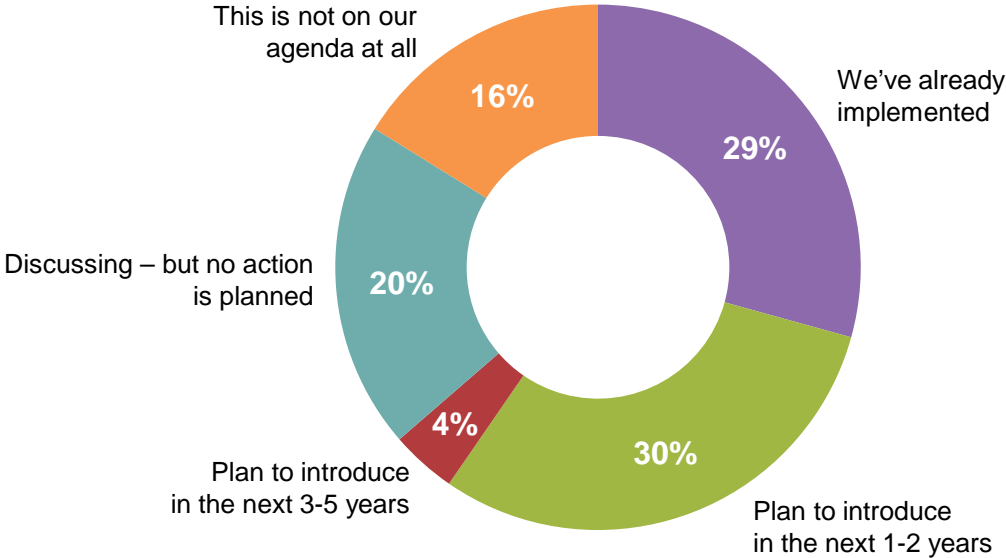
> " Interactive Internet services and custom company apps are the next wave of enhancements for us. It's still very much in the planning stages however. "
>
> — Global Travel Manager, USA

Mobile booking

Mobile booking emerges as the most favoured means for organisations to improve service. Almost two-thirds (63%) of respondents have either implemented mobile booking (29%) or plan to do so (34%). A further one in five (20%) are discussing the topic.

Chart 5: Mobile booking options

This is not on our agenda at all — 16%

We've already implemented — 29%

Discussing – but no action is planned — 20%

Plan to introduce in the next 3-5 years — 4%

Plan to introduce in the next 1-2 years — 30%

Focus on sharing economy travel options

The rise of the sharing economy is one of the biggest stories in travel – but how are business travel professionals responding?

Corporate Travel Managers show moderate interest in ground transportation sharing economy options. Over one in ten (13%) respondents have made provision for these options in policy. A further 13% are planning to implement in the next 1 – 2 years. One-third (33%) are talking about introducing policy – but a larger proportion, some 39%, say sharing economy options for ground transportation are not even on their agenda.

There is markedly less enthusiasm for accommodation sharing economy options. While over one in ten (13%) organisations surveyed have implemented accommodation options, and a further 8% plan to implement in the next 1 – 2 years, over half (56%) rule them out altogether.

During the focus group, participants cited security as their biggest concern with sharing economy options, particularly for accommodation. But lukewarm traveller interest may be as much to blame as worries over traveller risk. While just over a quarter (27%) of respondents have received queries from travellers about sharing economy options, almost half (45%) say their travellers aren't interested.

Word of mouth

"I see sharing economy as a big opportunity to drive down cost and engage people with a new way of working. I'm really excited about it. We're already using sharing economy options within our ground transport scope. We're pushing travellers towards it and they're asking for it."
— Head of Global Category (Travel, Car & Fleet), UK

"Would we use Airbnb? Absolutely not and that's mostly for security reasons. We don't see this changing in the next two years. It's different with Uber. We're still evaluating Uber in terms of safety – but we're not stopping travellers using it."
— Global Travel Manager, UK

"We've had a few people ask us about sharing options over the last months and as a result we put out a statement on the intranet. We did not recommend our people use them. Insurance and liability is an issue: what if there was an accident?"
— Travel Management Analyst, Canada

> 66 *How do you report the value of service to your colleagues in Finance? That's the $64,000 question! We're all trying to figure out how we show metrics for service value.* 99
>
> — Regional Head of Travel Services, USA

How do you justify improvements in the traveller experience?

	We use this today	We plan to in the next 1 – 2 years	We want to, but no plans	We don't use this information
Traveller feedback	75%	6%	8%	11%
Formal traveller survey	53%	16%	13%	18%
Traveller productivity metrics	21%	16%	19%	44%
Work-life balance metrics	9%	11%	22%	59%
Employee retention metrics	9%	13%	20%	59%
Stress reduction metrics	5%	12%	19%	64%

According to the research carried out for *The Evolution of Travel Policy*, most respondents believe that traveller service improvements support the drive for savings. The big question is: how can Travel Managers justify their focus on traveller service driving savings to colleagues in other departments like Finance, HR and Procurement?

For the majority (75%) of Corporate Travel Managers surveyed, it's an informal process, relying on occasional traveller feedback. However, more than half (53%) have set up more formal systems to gather feedback, using their own travel survey (or one managed by their Travel Management Company). A further 16% want to see this kind of system set up in their organisation.

The picture is very different when it comes to metrics designed to show improvements around business or HR objectives. While over one in five (21%) Corporate Travel Managers surveyed use some form of productivity metrics, fewer than one in ten (9%) use metrics around work-life balance or employee retention. Just 5% use metrics to link stress reduction with service improvements.

Looking forward, there's a clear interest in finding stronger metrics around people and performance. 12% of Corporate Travel Managers want metrics that capture stress reduction in the next 1 – 2 years, while a third (33%) want measures for work - life balance.

Respondents are also looking to capture the full ROI of corporate trips. Asked what would be on their 'Policy Wish List' for the next 1 – 2 years, four out of five (80%) respondents say they want to introduce some kind of Total Cost of Travel. This was almost twice as popular as the next wish list measure (setting up traveller user groups).

Corporate Travel Managers want to introduce these more sophisticated measures – so what's holding them back? According to one respondent, it's a question of finding the right data: "I would be interested to know how metrics are calculated on these points!"

66 Based on the impact we've made in the last three years on travel our profile has changed significantly in the organisation. We're now seen as a value-adding function. We get asked to provide pricing for planned merges or factory builds. Our initiatives help drive the organisation forward. 99

— Head of Global Category (Travel, Car & Fleet), UK

Improving communication with travellers is a consistent theme for Corporate Travel Managers. This section explores why and how Corporate Travel Managers are building better channels for communication with their travellers.

Information to improve compliance

Will give travellers a complete dashboard in 1-2 years — 20%

Already give travellers a complete dashboard — 8%

Give travellers basic information about their spend — 10%

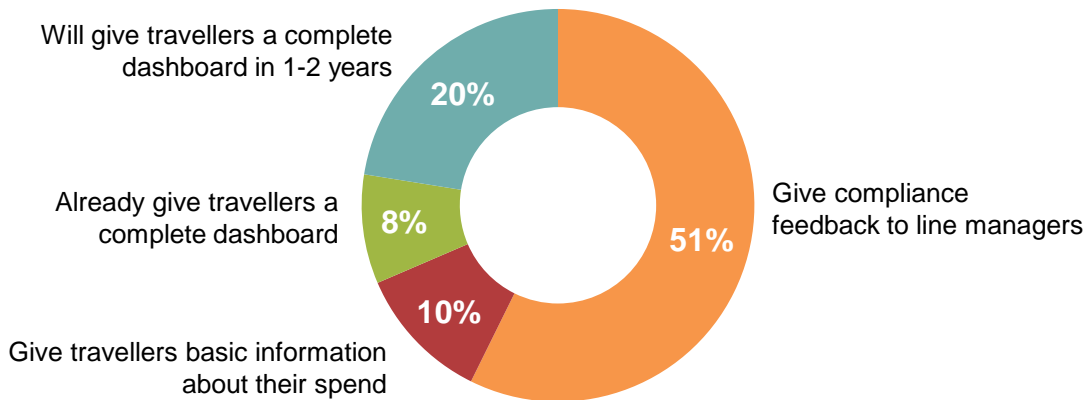Give compliance feedback to line managers — 51%

Chart 6: Informing travellers about travel spend and compliance

Corporate Travel Managers are convinced that communication drives up compliance, allowing them to educate travellers about policy and their responsibility for making it succeed. As one commented during the focus group, "travellers want to do the right thing – but they don't always know what the right thing is."

So what initiatives are organisations using to educate and inform travellers about their spending and compliance? The research shows that over half (51%) of organisations surveyed give compliance feedback to managers and team leaders.

One in ten (10%) respondents report directly to travellers with basic information about their spending, but many are more ambitious. One-fifth (20%) want to be able to give their travellers a complete dashboard including spending, benchmarks and goals within the next 1-2 years. As of today, fewer than one in ten (8%) respondents can give travellers this rich feedback.

> **66** People are very responsive to policy. This is because we have conversations with them to find out why they are travelling, and to design the policy with this in mind. **99**
>
> — Global Travel Manager, USA

Creating stronger communication channels
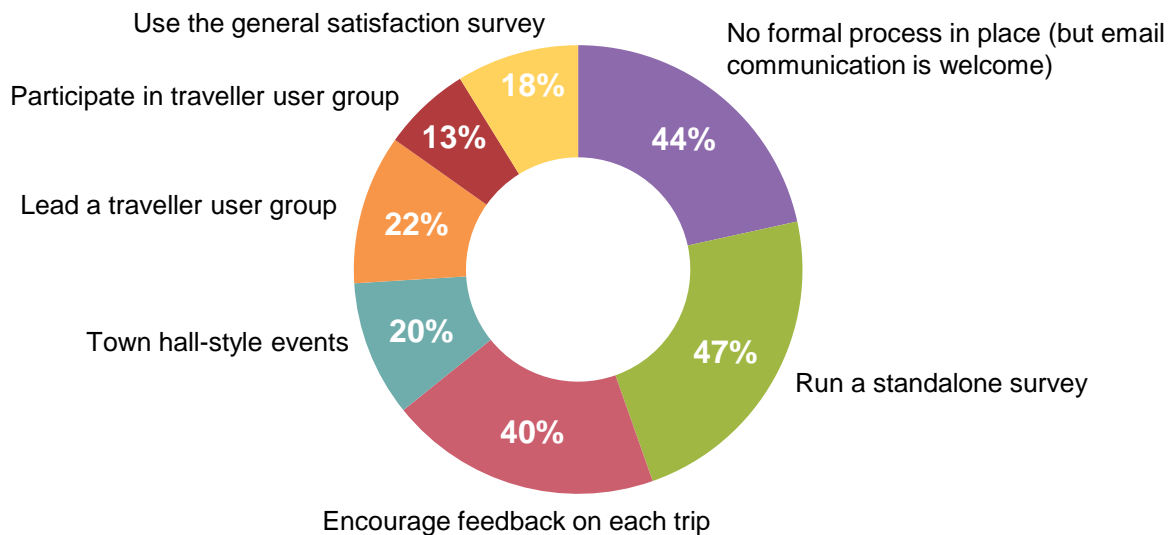
Chart 7: How do Corporate Travel Managers receive traveller feedback?

The research shows that Corporate Travel Managers use a wide variety of means to gather feedback from travellers, ranging from online surveys to face-to-face events.

A surprisingly large proportion (44%) of respondents today appear to have no formal processes in place whatsoever, instead relying on emails from travellers wishing to make an ad hoc comment.

Where formal measures are in place, a significant proportion of Corporate Travel Managers are taking advantage of online community technology to improve communication with travellers. As of today, just over one in five (22%) organisations have set up these communities, while a further 13% participate in employee-established user groups.

Respondents who report to Procurement / Strategic Sourcing appear particularly keen on adopting user group technology: 44% lead or take part in online user groups, compared to 35% of the general population of respondents.

Going forward, 42% of respondents rank setting up user groups as the second most important item on their 'Policy Wish-List'.

Word of mouth: getting closer to customers

"We use email and the intranet – but we're also using a group I created on our CRM."

"This year we developed regional travel councils made up of travel arrangers from various regions."

"We used to use forms to send in feedback – but our employees prefer to just send an email."

"We use the company 'Chatter' pages and have set up a dedicated travel group."

"We have frequent personal interaction with top 20 travellers."
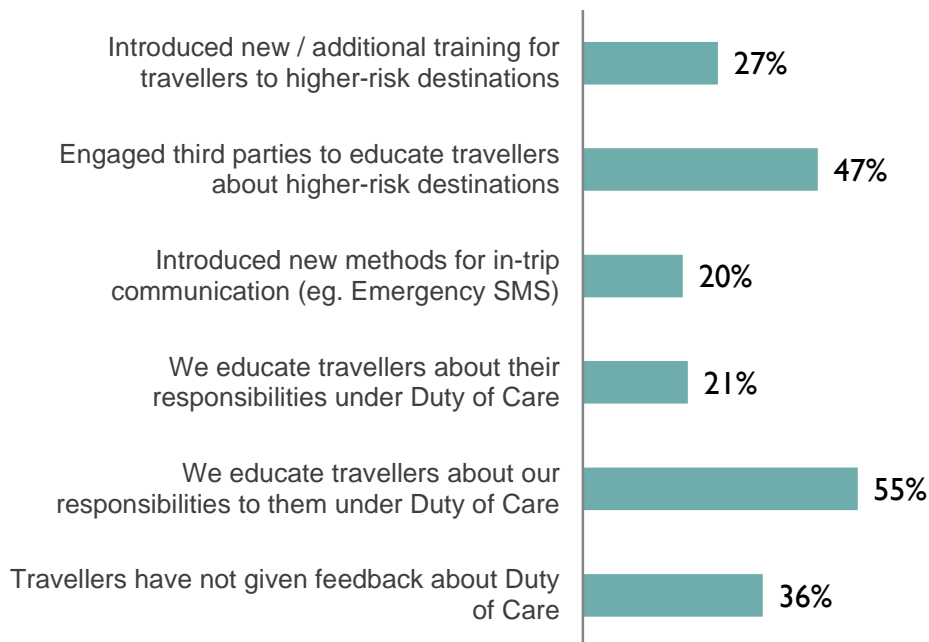
"Travel groups – live, not on the company intranet."

"The TMC sends a general email to travellers no more than twice a year – but they don't necessarily ask the questions we want answered."

> 66 In a sense there is a perception that duty of care practice detracts from the travel experience. People would just love to be able to book and go – but they understand that duty of care is there for their safety and the TMC will make it easier to book. 99
>
> — Director & Category Manager, Canada

Chart 8: Helping travellers stay safe

Category	Percentage
Introduced new / additional training for travellers to higher-risk destinations	27%
Engaged third parties to educate travellers about higher-risk destinations	47%
Introduced new methods for in-trip communication (eg. Emergency SMS)	20%
We educate travellers about their responsibilities under Duty of Care	21%
We educate travellers about our responsibilities to them under Duty of Care	55%
Travellers have not given feedback about Duty of Care	36%

As corporations have assigned greater value to their employees as strategic assets, duty of care has become an area of critical focus for Corporate Travel Managers. Almost a quarter (23%) of respondents say it has been the biggest single driver of travel policy changes over the last 1 – 2 years.

Over half (55%) of Corporate Travel Managers surveyed educate travellers about their employer's obligations under duty of care regulations. Over a fifth (21%) take this commitment to education further, ensuring travellers understand their rights and responsibilities.

Corporate Travel Managers are taking extra steps to reduce risk and safeguard travellers to higher-risk destinations. Almost half (47%) of respondents have brought in third-party experts to advise these travellers. Among those reporting to Procurement / Strategic Sourcing, this figure rises to 57%.

Organisations are also acting to improve in-trip processes around security and duty of care. One-fifth (20%) of respondents have introduced new methods to communicate with travellers.

> " Duty of care maybe was a check box thing before. Now people appreciate the value. We communicate that it's not 'Big Brother is watching you' but more 'Big Brother is watching out for you'. "
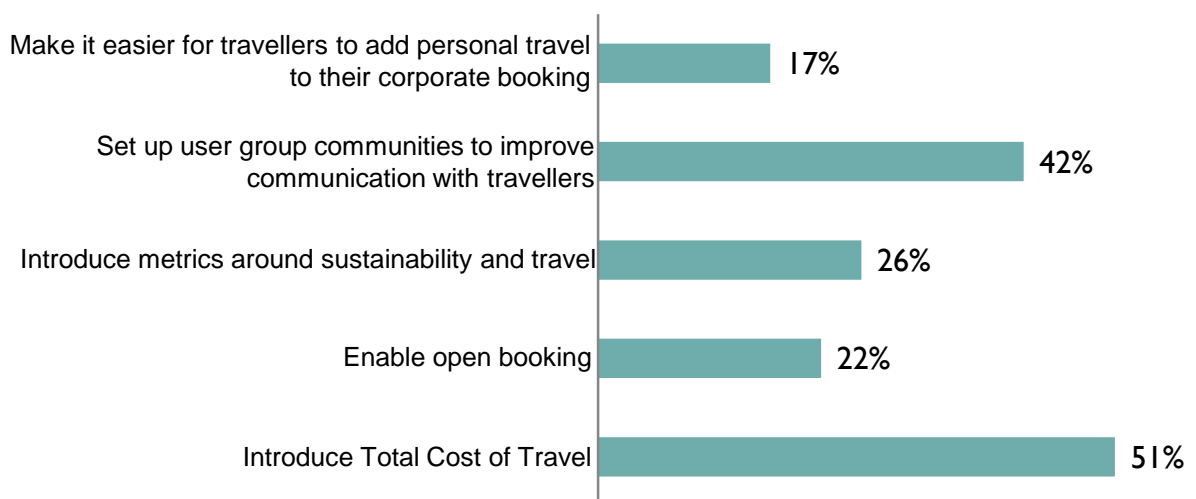>
> — Global Travel Manager, USA

One of the most striking trends identified by *The Evolution of Travel Policy* is the shifting balance between savings and service. In the past 1 – 2 years, respondents report that travel policy was driven chiefly by savings, while traveller service came a distant third in the Corporate Travel Manager's ranking.

Looking ahead, Corporate Travel Managers are placing increasing emphasis on traveller service. This will not come at the expense of savings; instead, Corporate Travel Managers expect better traveller service to support savings. It's not an either / or situation – it's more like a win / win.

As indicated, respondents are evaluating a range of initiatives to improve traveller service. Some are already making progress – like mobile booking and pre-trip messaging – while others are still on the drawing board. And some – like sharing economy travel options - remain minority interests.

A clear theme in *The Evolution of Global Travel* is the Corporate Travel Manager's commitment to using technology to make traveller life easier. Allied with this are efforts to improve communication and traveller education. Corporate Travel Managers are working across a range of initiatives to support traveller satisfaction and improve compliance to policy.

Chart 9: Policy Wish List for the next 1 – 2 years

Category	Percentage
Make it easier for travellers to add personal travel to their corporate booking	17%
Set up user group communities to improve communication with travellers	42%
Introduce metrics around sustainability and travel	26%
Enable open booking	22%
Introduce Total Cost of Travel	51%

So what does the future hold? Asked what would be on their 'Policy Wish List' for the next 1 - 2 years, respondents focus on practices and tools that use technology to improve communication and help travellers play their part in the smooth operation of policy. The top two initiatives are Total Cost of Travel reporting (selected by 51% of respondents) and user group communities (selected by 42%). Interestingly, 22% of Corporate Travel Managers add open booking to their wish list. In real life, however, they are more pragmatic: only 11% expect policy on alternate booking channels to become more flexible.

While delivering on savings and service, Corporate Travel Managers will continue to extend their area of competence. With duty of care, the profession has quickly accepted a new set of responsibilities. The willingness of respondents to develop new metrics around sustainability or productivity suggests Corporate Travel Managers want to engage even more widely with their organisation's strategic agenda.

ACTE surveyed its community of Corporate Travel Managers during two weeks in August 2015. Just over 350 Corporate Travel Managers and / or Buyers participated in the quantitative survey. In addition, ACTE hosted a global focus group with Corporate Travel Managers and Buyers to help design the research.

A note on the research participants

Of the Corporate Travel Managers who participated in the research, just under half (49%) represent organisations with an air spend of US$15 million per annum. 38% spend between US$15 – US$100 million and 13% spend US$101 million or more.

Over three quarters (76%) of respondents describe their travel programme as mature (of this, in 31% of organisations the programme is undergoing significant restructuring).

In terms of accountability, over a third (37%) of Corporate Travel Managers report to Procurement / Strategic Sourcing, a quarter to Administration / Shared Services and 24% to Finance.

About the Association of Corporate Travel Executives (ACTE)

ACTE GLOBAL — ASSOCIATION OF CORPORATE TRAVEL EXECUTIVES

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 travelers, 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 American Express Global Business Travel

AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL

American Express Global Business Travel enables corporations and empowers business travelers with insights, connections and exceptional customer service on a global scale. Through technology and information, American Express Global Business Travel provides leading travel solutions, integrated consulting services, proprietary research, and end-to-end meetings and events capabilities. These innovative offerings enable clients to optimize the return on their travel and meetings investments.

American Express Global Business Travel has operations and network partners in nearly 140 countries worldwide with approximately 12,000 employees. American Express Global Business Travel ranked first among corporate travel providers in the 2015 Corporate Travel 100 ("CT100"), an annual listing compiled by Business Travel News which ranks companies with the largest volume of U.S. air bookings. Learn more about how American Express Global Business Travel connects the world at www.amexglobalbusinesstravel.com. American Express Global Business Travel ("GBT") is a joint venture that is not wholly-owned by American Express Company or any of its subsidiaries ("American Express"). "American Express Global Business Travel", "American Express" and the American Express logo are trademarks of American Express, and are used under limited license.