



ACTE  
RESEARCH

BCD•travel

# Quality Management in Business Travel

An ACTE Corporate Travel Study  
in collaboration with BCD Travel

OCTOBER 2018

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# ACTE FOREWORD

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**Greeley Koch,  
Executive Director at Association of  
Corporate Travel Executives (ACTE)**

Emerging technologies, AI, voice recognition, machine learning, online transactions, as well as new ways for travellers, suppliers and travel managers to communicate—the advances in business travel are coming at a blistering pace.

Many of these innovations will greatly improve your travellers' experiences, some not so much. With no standard or consistent way to measure quality management—or even consensus as to what exactly *constitutes* quality—it's hard to know which metrics are helpful and which are just noise.

Despite the technology, we are still assessing quality management as we always have—with valuations like booking statistics, policy compliance and call centre stats. While these results can be easily measured and analysed, they tell us little about trip success rate or about traveller productivity, satisfaction or friction.

With business travel a key revenue driver, quality management is a huge area of interest for our members. Our August survey of members received one of our highest response rates in years. Industries and spend categories were well represented, from companies laying out less than \$1 million to those spending \$50 million and above. Most respondents were from North America, Europe and the Asia Pacific region, though there was strong response from Africa, Latin America and the Middle East.

#### Key findings:

- Eighty per cent of respondents want a standard system of measurement.
- Compliance, savings, spending and booking stats have been considered more important assessments of quality than actual traveller satisfaction or trip success rate.
- Factors such as traveller friction, trip success rate and HR information were rarely used as indicators of quality, despite the importance placed on these same indicators.

We hope this paper will better help you understand the opportunities and challenges inherent in quality management as well as provide you with insight from industry leaders that will prompt discussion.

As with any matter that affects our industry, I would like to hear your thoughts. The best insight always comes from our members. Please email me at [gkoch@acte.org](mailto:gkoch@acte.org) or have a word with me at one of our events.



# BCD FOREWORD



**Miriam Moscovici,**  
**Senior Director, Research and Corporate**  
**Innovation, BCD Travel**

*"...Few factors are as important to the performance of the organisation and everyone in it [as measurement]."*

— Peter Drucker. *Management: Tasks, Responsibilities, Practices*

Every great journey begins with a first step, and in the vital and important discipline of corporate travel, the first step must be some level of measurement. We don't measure for measurement's sake. The purpose of measurement is improvement – a path to quality. Without a set of principle measurements, it is difficult to analyse data meaningfully and build an understanding of progress over time.

However, when it comes to the fundamentally important task of measuring quality in the corporate travel industry, there is no industry standard.

Many of the measurements used today, which are intended to determine a programme's success, were developed before the business travel industry moved from an agent

model to a digital model. Instead there is a legacy approach centered around savings and transaction volume. It is now more readily understood that programmes must also take sales success and traveller experience into account.

We all recognise that this is a problem, but who has time to fix a leak in a tire while barreling down the highway? For BCD Travel and our Research and Intelligence team, ineffectual measurement is a fixable problem. And we think suppliers have a key role to play in helping our clients solve it.

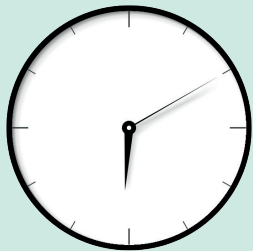
This paper is intended to provide our industry with an entry point for establishing standard measurements of quality. It has the potential to improve results for companies as small as mom and pop and as big as the Corporate Travel 100. And who better to partner with in a mission to establish industry standards for quality than ACTE, an industry association dedicated to advancing business travel?

In this report, we review current quality management practices in business travel. We challenge whether traditional methods still do that. We propose new approaches for determining how quality should be measured moving forward. And we argue that now is the time to take action.

Influenced by the B2C environment, travel buyers today expect more from travel suppliers at every stage of the journey, from planning to in-trip to expense. They've been influenced by personalised service that lets them research, shop and fulfil orders anytime, anywhere and from any device.

Now is the time for buyers and suppliers alike to begin laying down the foundation for a better way to measure quality, and to begin creating new standards for quality management. We hope that you will join us in this effort, beginning with the study of this research paper.

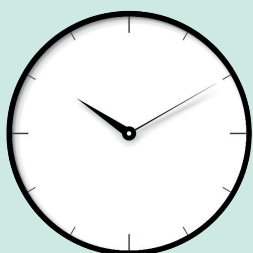




NEW YORK



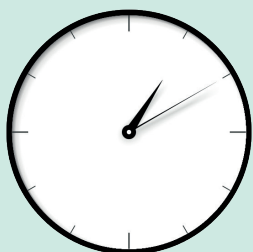
BEIJING



LONDON



TOKYO



MOSCOW



SYDNEY

# STATE OF THE TRAVEL INDUSTRY

In the last 20 years, global travel has become more affordable and accessible. Business travel in particular has long been an integral part of any company's growth strategy. But the needs of today's traveller are now more complex. This complexity is directly related to digitalisation<sup>1</sup>.

**Business travel spending is forecasted to rise to \$1.6 trillion USD by 2020.<sup>2</sup> In 2013, a study conducted by Oxford Economics USA found that for every dollar in business travel spending, companies realise \$12.50 in incremental revenue.<sup>3</sup>**

## Can the value of travel be sustained?

While this demonstrates the value that travel offers businesses today, can this value be sustained, and even improved?

The answer is yes, but only if we can measure standards in a way which is responsive to the end-user experience and treats business travel as an investment, rather than as an overhead.

Travel was once a physical, linear experience. You went to the travel agent, who supplied your flight tickets, hotel, car reservations and itinerary, often in a branded wallet. Agents also supplied ancillary services and responded directly to logistical or quality concerns. The trip started and ended in the travel agent's office, with the experience managed and measured in a one-on-one interaction.

It's hard to overestimate how comforting, if antiquated, this process was, for both the travel manager and customer. It enabled both parties to own the process and address customer service issues at a single touchpoint.

## Digitalisation enables greater integration

Today, digitalisation not only removes human interaction, but also enables the customer to simultaneously interact with the travel ecosystem across multiple touch points. From flights to hotels, taxis and ancillary services, almost any travel-related form of content can now be arranged through digital third parties. This leaves the travel manager with less control over the end-user's experience, making it harder to demonstrate value.



## SIX WAYS WE MEASURE QUALITY TODAY

1. Spend and savings (i.e. booking and hotel costs YOY) - 88%
2. Booking statistics (i.e. advance booking, online adoption, hotel attachment, defects) - 81%
3. Policy compliance (i.e. unmanaged spend, booking/payment methods, leakage) - 80%
4. Traveller satisfaction surveys (i.e. net promoter score, surveys, service issues) - 65%
5. Call/Contact centre statistics (i.e. average speed of answer, average handle time) - 39%
6. Traveller engagement (i.e. method/frequency of interactions with TMC or travel department) - 37%

### Finding a balance between value and quality

While digitisation has boosted profits, it has not simultaneously led to improved quality management. Why this is the case must be understood as we assess the balance between bottom line value and quality.

To explore this issue, we conducted a survey of 301 corporate travel managers, from a wide range of sectors, with air spend budgets right up to above \$250 million, from across the globe.

**The survey questions were asked of a global audience of 301 members operating across regions, including North America (84%), Europe (79%), Asia Pacific (74%), Latin America (56%), Middle East (50%), and Africa (42%).**

The goal was to understand more about the importance of quality management, what is measured and why, and the procedures for reporting success.

### Relying on outdated metrics

The findings revealed that the industry is using some incomplete or even outdated metrics to measure quality. Survey respondents identified policy compliance, spending, savings and booking statistics as the most important in measuring quality management. They gave each of the four a higher priority than traveller satisfaction, trip success rate and traveller friction.

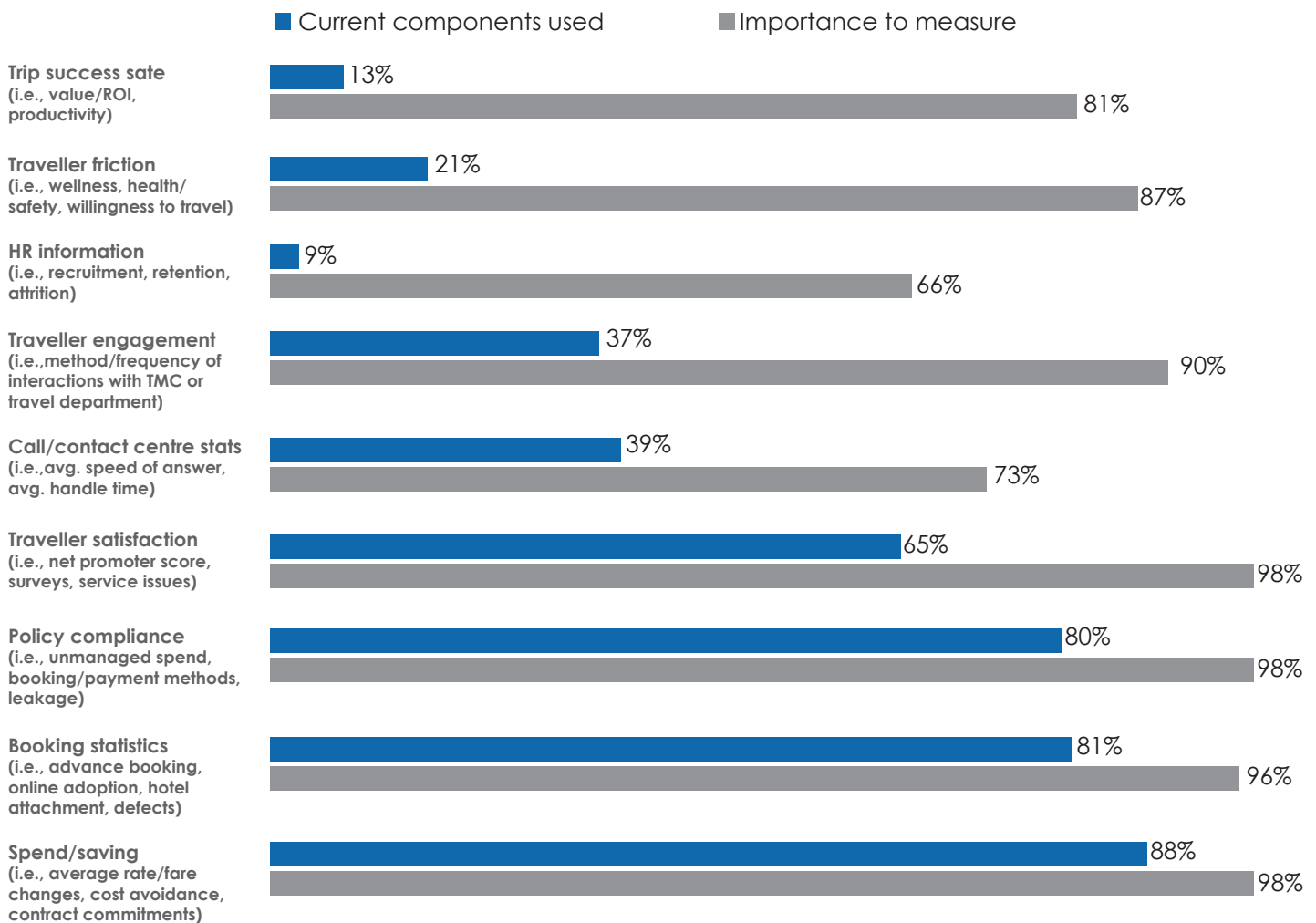
The survey unearthed a curious trend, in which customer-satisfaction is primarily being measured through third-parties, or is even given a lower priority than back-office processes, with quality considered to be proportionate to upfront costs and savings.

### Assessing current metrics used

Asked which components are currently used to measure the quality of a travel programme, 88% of respondents said spending and savings. That contrasted to 12% who did not use them as a measurement. Meanwhile, 81% said they used booking statistics (advanced booking, online adoption etc.) to measure quality, and 80% said policy compliance.



## QUALITY MEASUREMENT OF A TRAVEL PROGRAMME: WHAT IS USED VS. WHAT IS IMPORTANT



### TOP FIVE DATA SOURCES USED TO MEASURE QUALITY FOR TRAVEL PROGRAMMES

1. TMC/Agency reporting – 94%
2. Supplier reporting – 81%
3. Internal expense reporting – 71%
4. Corporate card data – 67%
5. Traveller surveys – 61%

### THREE OVERLOOKED FACTORS WHICH OFTEN INFLUENCE QUALITY MANAGEMENT MEASUREMENTS

1. Traveller friction (i.e. wellness, health & safety, willingness to travel) – 21%
2. Trip success rate (i.e. value/ROI, productivity) – 13%
3. Human resources information (i.e. recruitment, retention, attrition) – 9%

### Exploring the missed opportunity

Only 9% of respondents cited human resources as a quality management measurement, placing that category among most overlooked factors. Trip success rate (13%) fared only slightly better, and traveller friction (21%) was also rarely used as an indicator of quality.

Notably, customer satisfaction is being measured through second-hand sources in order to assess the quality of those two components, with 94% of respondents relying on TMC reporting and 81% on supplier reporting to measure the quality of those two components. This contrasts with 61% who are using traveller satisfaction surveys. And despite the value placed on suppliers for delivering business travel, nearly half (46%) of survey respondents reported having no incentives or penalties around established service level agreements to reinforce quality.



### Shifting from cost to experience

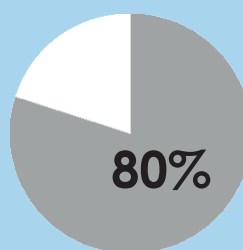
Measuring quality management remains largely focused on cost. There is an industry-wide understanding that there needs to be a better measure of 'experience', but there seems to be no universal agreement over precisely how that might be done.

**Today, the industry is inherently traveller-centric and is driven by technology that has helped evolve and simplify the booking process, as well as increased expectations from customer experience. Social media has played a crucial role in moving the consumer into the public eye.<sup>4</sup>**

As the industry has evolved towards a traveller-centric operating model, there has also been a shift to measuring overall 'experience'. Over time, different methods have been adopted by various industries, from Six Sigma to Net Promoter Score (NPS), but no universal standard has been agreed. One reason for the indecision may be the lack of a clear and consistent definition for quality management.

### Creating a standard system

What most respondents did agree upon was the need for a standard system of measurement for the corporate travel industry.



**of respondents advocate that a standard system of measurement would have a positive impact on corporate travel.**

Currently, quality is measured differently from one travel manager to the next, as well as between travel managers and suppliers. There is no industry standard, no universally agreed terms, and no commonly understood or accepted and utilised system.

Whatever measures are agreed that set a new method for quality management, the key to progressing in this industry is greater clarity.

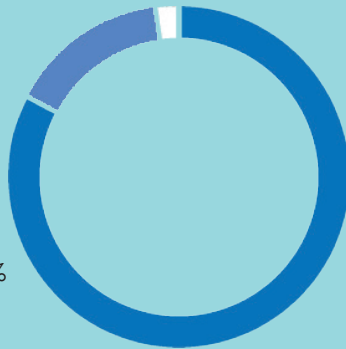


# QUALITY MANAGEMENT 101

ACTE members were asked about the importance of how they use their travel programme and review the quality. They responded:

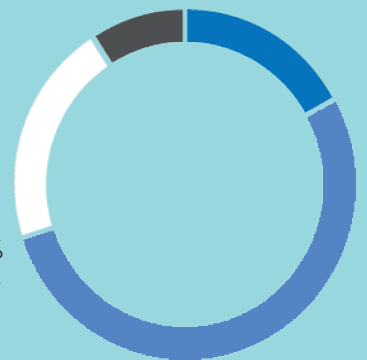
## We review reports monthly or quarterly

- Completely agree - 83%
- Somewhat agree - 14%
- Somewhat disagree - 3%
- Completely disagree - 0%



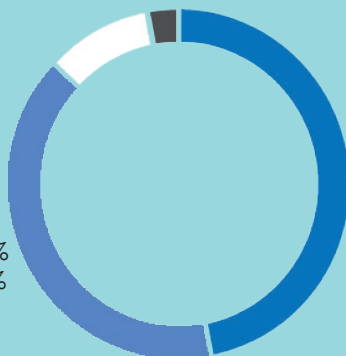
## We rely on our TMC to identify Improvements

- Completely agree - 17%
- Somewhat agree - 53%
- Somewhat disagree - 21%
- Completely disagree - 9%



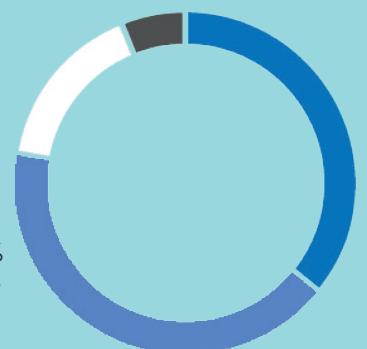
## We benchmark against our own performance

- Completely agree - 47%
- Somewhat agree - 40%
- Somewhat disagree - 10%
- Completely disagree - 3%



## We benchmark against industry performance

- Completely agree - 36%
- Somewhat agree - 42%
- Somewhat disagree - 16%
- Completely disagree - 6%



# SPEAKING OUT

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To explore the findings further, we spoke with experts from across the industry, all of whom had unique perspectives and differing priorities when it comes to quality.



**Scott Gillespie**  
Head of Analytics, ARC

“Judging the quality or effectiveness of a travel programme using metrics like savings, spend under contract and time on hold is yesterday's thinking. Business travel is about business, not travel. Travel managers need to look past their traditional tactical metrics if they want to create strategic business value. They must now align their policies and programmes to the broader goals of the travel budget owners. Examples include improving trip success rates and decreasing road warrior attrition.

The travel management industry must make this leap forward if it wants to become a more valued business partner to senior management. The formula is simple. Ask senior management what are the most important expectations in return for the money they spend on travel, and then show them how modern travel management practices can help them achieve those goals.”



**Marta Rodríguez  
Martínez**  
Global Travel Business Insights &  
Analytics  
Microsoft

“There needs to be greater alignment across the industry. Transparency is key to opening a meaningful debate on this topic. Not only is there a legacy tendency to be proprietary owned process, but there is also mystery in the chain around accountability for faults. In order for a more robust quality management programme or benchmark to happen, there needs to be a willingness to be open and share our data in order to achieve a better foundation of what quality looks like. Benchmarking quality would be a step in the right direction, but it would have to include greater alignment, flexibility of service, transparency and accountability that goes above individual companies' own agendas.”





**Yannis Karmis**  
Senior Vice President, Product  
Planning & Development  
BCD Travel

“Our understanding of quality—service quality in particular—including traveller satisfaction, should be expanded to recognise that our engagements are now more holistic than ever. Currently, there is no mechanism to recognise that the landscape has changed, that our engagements are broader, that there are more touchpoints, and that they are more sophisticated. If a modern, high-quality corporate travel plan is what you're looking for, then you need to be measuring more than just interactions.

As a sector, we're measuring the wrong things, with metrics that are dated for modern and future travel programmes. For example, the industry places too much emphasis on call centre metrics. With fewer and fewer transactions going through the call centres, we need to pivot our thinking and measure traveller engagements through technology. For BCD, for example, this expands to the actions a traveller takes after receiving a trip alert on their phone via TripSource.”

### **The opportunity for business travel**

In a field with more variables, stakeholders, possible outcomes and moving parts than almost any other industry, it would be easy to get lost in possibility.

There is a wonderful opportunity for all in the business travel sector to modernise in a way that packs a punch, from simply booking travel to more directly supporting the boardroom.

In the next section of the paper, we explore the views of the wider industry and draw inspiration from retailers and financial institutions.





**“There have typically been three ways to measure quality in finance: questionnaires, call recordings and SLAs. However, this has changed, given the new opportunities that Big Data and AI provide.”**

# WHAT WE CAN LEARN FROM FINANCE

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When it comes to our money, few things could be more important than quality management. In a world where we work longer and harder than ever to earn our living, the idea of poor service is tantamount to being short changed whilst purchasing a product.

The financial landscape has transformed in recent years. Following the 2007 economic crisis, increasing scrutiny from consumers and businesses forced the industry to re-engineer its quality-management processes and become more accountable and transparent. This new-found transparency was essential in driving improvements to quality management – something which the business travel industry is under increasing pressure to deliver.

## **Factors that changed quality in finance**

Digital transformation and an exponential rise in direct customer engagement has further influenced the transition of quality in finance. Twenty years ago, customers queued in a bank to make payments and receive advice – managing finances was an inconvenience. Customers wanted and needed more – “generic product advice and services support will not do for today’s financial services customers. They expect their data to be leveraged into personalised advice and benefits”.<sup>5</sup>

Finance reacted accordingly, by owning personal relationships with customers and opening up, as well as creating new-found transparency, providers were able to offer 24-hr banking and money management services.

## **Drawing inspiration externally**

Furthermore, the growth of Open Banking APIs will enable more institutions to behave like banks, attracting companies outside of the traditional financial spheres. Technological behemoths with deep customer relationships, like Google and Amazon, now have the opportunity to access finance data streams and lead the way in providing more personalised and ergonomic banking services.

The winners in this case are end-users, now enjoying better value, comfort and experience. Essentially, the financial services industry will have met customers’ “primary concern” - a way to communicate which is “quick and has easy access”.<sup>5</sup>



## Evolving from traditional measurements

Moreover, there have typically been three ways to measure quality in finance: questionnaires, call recording and SLAs. However, this has changed, given the new opportunities that Big Data and AI provide. Comfort with computer-generated support is growing, bolstered by lower costs, increased consistency and high reliability.<sup>5</sup> Such technological change will “improve performance and efficiency”<sup>6</sup> and therefore satisfy customers further.

The corporate travel sector should look to financial services and be encouraged to consider a degree of reinvention, designed with the new digital landscape in mind. Who would have thought that banks could be branchless, or that savings and investment advice could be augmented through robots? Banks recognised that the sellable, value-added services were essentially customer service offers. For these to be offered effectively, end-users had to be given a minimum level of convenience, simplicity and security. These assets had to be continued and were uniformly enforced through consistent industry standards and regulation.

## Using end-user data to drive change

Core to this and driving change in Financial Services was end-user data. Only through the safe collection and storage of this data can bespoke solutions be delivered.

**Data management, and data analytics will be core to the delivery of consistent quality management in business travel.**

Therefore, quality management is a priority for all involved to compete to retain customer relationships. Business travel should be equally inspired to retain and compete for personal relationships. Like legacy banks, business travel vendors should also be keenly aware of third-parties entering into territories that are thought to be exclusively theirs. Even with established high-street banks, their payments revenues are now being disrupted by digital banks offering a better customer experience. This is proof that quality is more often than not aligned from the end-user's perspective, and that customer service and quality management must remain a core investment.



# INDUSTRY COMMENTATOR

## Is quality management a priority? How has it changed?

“In the past, quality was seen as an add-on which grew out of a production line and only then was incorporated into business practice – you do the work and get auditors in to check it. Over the years, this has become increasingly refined. Quality is now embedded throughout the entire process and production. You have to walk the walk and live the quality rather than add it on. There is much more of an acceptance of this culture now.

The KPIs have also changed over the years. They are now much more about outcome, whereas previously they were about the process. Therefore, if you followed the process, everything would be fine. However, this did not consider that changing people is one of the hardest aspects. You can implement a new system, but people may find ways to subvert its efficient usage. Consequently, affecting subjects of change has become crucial.”

## What metrics are used? Are these difficult to measure?

“The ideas for evaluating quality have existed for years but the ability to provide the supporting tools were not available. As technology has evolved, this has improved. Now we have web-based tools which have offered the exponential ability for us to provide collaborative working, which has been advantageous for a global business. Furthermore, the ability to talk to someone face-to-face and retain a relationship despite being miles away from one another, has been crucial.

The metrics are often questionnaires or monthly training for people assessing their abilities and capacities. Sometimes they are qualitative in terms of end of year and half-yearly reviews.”



**Paul Davis**

Business Change Manager  
and Consultant

Paul Davis has over 20 years of experience in business change analysis across the financial services and has worked with numerous global financial institutions.





# WHAT WE CAN LEARN FROM RETAIL

Quality management in retail includes a laser focus on both goods and service. Each is essential for increasing the potential audience for the brand, maximising sales and influencing the possibility of repeat purchase or a future recommendation.

In service terms, retail has clear parallels with business travel. It depends on a relationship (however briefly formed) between a service and person. It exists at the junction between expectation and delivery, somewhere between the thing that the customer wants (and expects) and a level of service and attention that the provider understands and can fulfil, quickly, efficiently and effectively.

**In the past 10 years, retail has evolved at break-neck speed. The traditional in-store set-up is no longer dominant and other channels have emerged, enabling us to purchase when and where we like, and from almost any device.**

## **Adopting new technology has led to new standards**

This growing technological capability has acted as a catalyst, fueling innovation. There no longer exists a battle between on and offline shopping. Instead, we have been presented with various integrated offerings, which deliver speed, convenience and choice to consumers. This convenience manifests itself in its quality management, where consumers are given a variety of platforms to complain: social media, apps, online or over the phone. Retail brands "want a closer connection with their consumers"<sup>7</sup> and this facilitates that connection.

## **Meeting the demand for greater transparency**

As such, the industry has been forced to adjust and become transparent in a "challenging market where consumer spending is being squeezed and costs are rising".<sup>7</sup> It is impossible to hide from criticism; and the industry has learnt to adapt to feedback and closely monitor such metrics to make appropriate changes, ensure customer satisfaction and retain crucial personal connections.

Emphasising the value of quality management is Amazon, who's founder, Jeff Bezos, understands the importance of a frictionless service offer. "We see our customers as invited guests to a party, and we are the hosts. It's our daily job to make every important aspect of the customer experience a little bit better".<sup>8</sup> This sentiment is reflected by Amazon's speed, scope and convenience.



## PUTTING THE SPOTLIGHT ON AMAZON

Amazon also illustrates the presence of the ISO family of quality management standards, designed to help organisations meet the needs of customers and stakeholders while meeting statutory and regulatory requirements related to a product or service.

Notably, Amazon Web services applies ISO 9001 to support customers who develop, migrate and operate their quality-controlled IT systems in the Amazon Web Services (AWS) cloud. In doing so, Amazon Web services can track a product's or service's ability to satisfy the requirements of confidentiality, availability, integrity, and security.

### Can ISO 9001 be applied to quality management in Business Travel?

While ISO 9001 certification is a good prerequisite for business travel quality certification, it cannot entirely express it.

#### Drawing parallels with travel

Quality in travel consists of product quality, service quality, and management quality. This requires a commitment at boardroom level to improve, differentiate and future-proof a service characterised by emotive, minute by minute customer-experience.

Therefore, a broader measure of quality is needed in business travel which can borrow from the responsive and intuitive approach to customer service, exhibited by retailers with every clickable transaction. Like retail, the travel sector cannot assume that the status quo will remain: technology will continue to change the way end-users interact with a service provider, and their expectations will rise accordingly. In such an environment, quality management cannot be left to chance.

#### Remaining in step with change

If the travel industry is to remain in step with technological change, then standards must be uniform, transparent and responsive to a rapidly changing landscape. Yet like retail, corporate travel must not consider the smart-phone wielding customer a threat. The industry has much to gain by utilising sales and customer service data to drive a more bespoke service. The challenge going forward will be for quality service levels in business travel to remain consistent in their response to, and measurement of, an ever-increasing array of end-user needs, responses and expectations



# CALL TO ACTION

## CONCLUSION

Defining a standard method of quality management is clearly a priority. As access to data and evolving management tools has made consistency a challenge, the question we need to ask ourselves is what should a standard measurement look like, and how can we all implement it?

Flexibility is essential as there are a wide range of needs, spends and volumes at work. Every company has separate goals and objectives and varied techniques for reporting have become ingrained over time.

As we have seen throughout this report, there is a universal desire for change. Members have spoken out in favour of greater focus on spending, savings, policy compliance and booking statistics.

Whilst there's complexity, there's also a sizable opportunity. Access to these advanced measurements provides us with the ability to better understand the traveller journey, to improve their experience and to demonstrate to senior leaders how valuable our contribution really is.

In the meantime, the question remains, whether you're looking to pack a profitable punch at the next big board meeting, or take your quality management programme to the next level. The 'rip and reads' on this page can help with everything from reviewing your SLA, to organising digital data and incorporating it into your measurement plan.

## SLA

### *Service Level Agreements*

Commonly used to form contracts between a service provider and other third parties. It defines the level expected from a vendor laying out the metrics by which service is measured, as well as incentives or penalties agreed upon to reach desired service levels.

## HERE ARE THREE AREAS YOU CAN ADDRESS TODAY TO MAKE MAJOR CHANGES TO YOUR PROGRAMME.

### 1. Areas that impact your programme

- 
- Contractual agreements and performance
  - YOY financial impact
  - Alignment to corporate goals and objectives
  - Policy awareness, education, and compliance
  - HR indicators
  - Trip success rate
  - Traveller satisfaction
  - Traveller engagement
  - Traveller friction
  - Call centre stats

### 2. Figuring out the deal with SLAs

- Its time to review your supplier SLAs. Are the measurements you have agreed fit for purpose? Have they recently been reviewed and updated?
- Are you using penalties or incentives? Which do you think is more effective? Consider changing the method you use to see if it improves the quality of your programme.
- When you consider future suppliers, ask them questions that align to your corporate goals and objectives. Do they have a sustainability policy? How are they able to facilitate the connectivity of your staff along their journey? Gather information to inform the measurement of your programme.

### 3. Topics to raise with your partners

- What can they measure and how quickly can they share results?
- Do they have a quality management programme in place?
- How can they help you to measure your programme success more effectively?
- Ask them for their feedback on your programme/ brief.

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