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BTN MONITOR

REPORT TO RESPONDENTS | 2013

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Responses from 244 corporate travel and meetings buyers and managers contributed data that *Business Travel News* used in the past year for four different articles: Premium Class Travel, Meetings Technology, Expense/Payment and Emerging Markets: Latin America.

While about 40 percent of the respondents allowed their travelers to use business class and premium economy air travel, very few travelers were allowed to use most other forms of premium products. One third of respondents did not allow the use of any premium travel products.

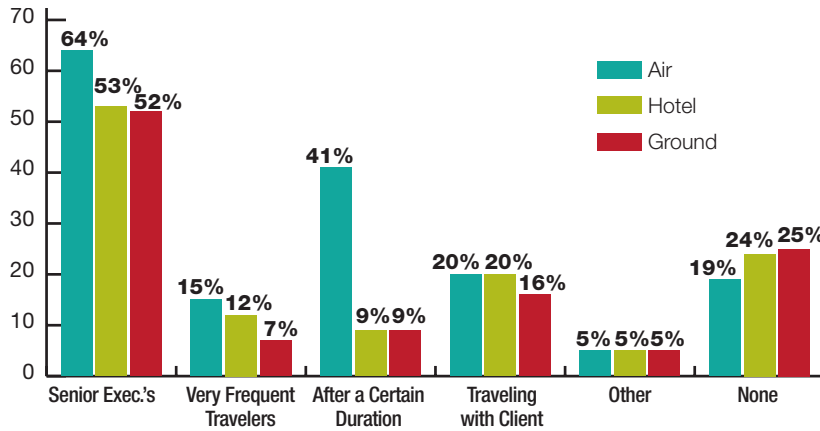
Half or more respondents said their companies use budget tracking, attendee registration, online hotel and air booking and electronic payment tools for meetings.

Two-thirds or more respondents said that their companies implemented expense reimbursement systems, deployed corporate cards and reviewed expense policies and systems.

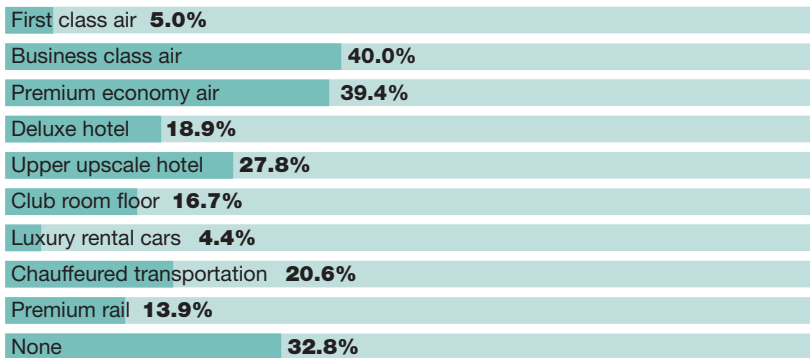
About one-third of respondents said that they aligned global, regional and local travel decisions in Latin American and another third said they are working on it.

The BTN Group thanks you and your fellow respondents for contributing the following data.

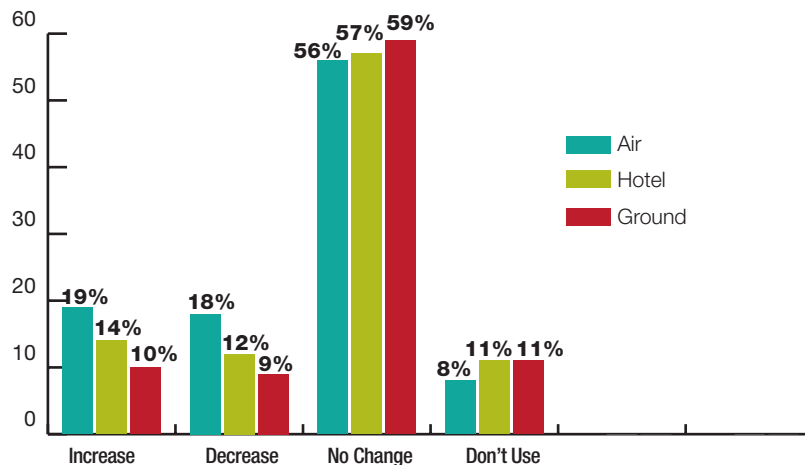
1 Travelers And Types Of Travel Eligible For Premium Class Service



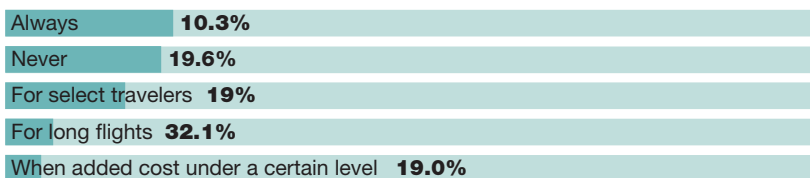
2 Premium Products Standard Travelers Are Eligible To Use



3 Change In Premium Class Travel Use From 2012 to 2013



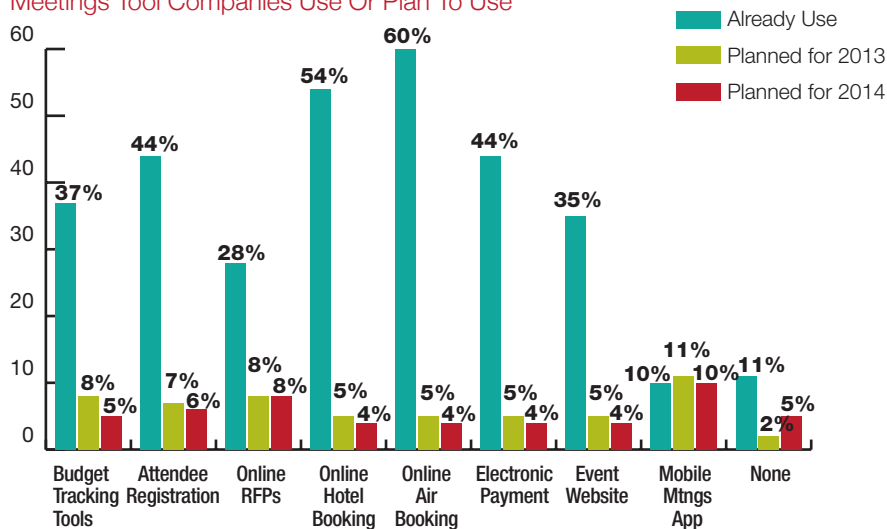
4 Premium Economy Air Travel Permitted



5 Impact Premium Economy Will Have On Travel Spending

Overall air costs will decline since premium economy represents a lower-cost alternative to business class travel	17.8%
Overall air costs will increase as premium economy represents higher-cost alternative to economy travel	34.6%
Neither	27.0%
Not applicable, don't use	20.5%

6 Meetings Tool Companies Use Or Plan To Use



7 Influence Of Departments In Selecting Meetings Technology (Using a 6-point scale, with 1 meaning having no influence and 6 meaning extremely influential)

	1	2	3	4	5	6
Finance	19%	10%	13%	12%	20%	24%
Procurement	22%	9%	6%	16%	17%	24%
Travel	13%	9%	9%	10%	22%	33%
Meetings	24%	5%	7%	10%	17%	22%
IT	29%	11%	17%	14%	12%	10%
HR	36%	18%	14%	11%	7%	2%
Senior Management	11%	7%	8%	12%	24%	33%

8 Travel Agency Supports Company Use Of Meetings Technology

Yes, in helping to determine who is eligible to use the technology	8.3%
Yes, in suggesting how to implement the technology	13.7%
Yes, in suggesting technology practices for meeting stakeholders	14.9%
Yes, in analyzing and/or creating reports from data the technology generates	19.6%
No, they don't	36.3%
No, we don't use meetings technology	34.5%

9 Companies Integrating Expense And Other Systems

	Yes	No	No, but plan to do so in 2013
Payment system	65%	26%	5%
Online booking	43%	47%	6%
Other TMC/general travel systems	27%	58%	4%
General ledger/ financials	61%	27%	4%
HR/organizational hierarchy	46%	40%	4%
Auditing	48%	35%	3%

10 Business Travel Payment Options Companies Use

	Yes	No	Percentage of total T&E
Individual corporate cards	91%	5%	3%
Corporate ghost card/lodge accounts	63%	26%	3%
Single-use cards	12%	61%	1%
Personal cards	51%	28%	3%
Electronic Funds Transfer	22%	41%	1%
Cash	35%	41%	1%

11 Expense Management Actions Companies Have Taken

	Yes	No	No, but plan to in 2013
Refused to reimburse travelers if policy not followed	44%	47%	4%
Implemented an online expense reimbursement system	65%	24%	5%
Upgraded to a new online expense reimbursement system	31%	56%	4%
Deployed corporate cards to more employees	65%	29%	4%
Selected a new corporate card provider	21%	61%	11%
Increased auditing of expense reports	52%	41%	3%
Reviewed expense policies and systems	72%	16%	8%
No changes needed to expense policies, systems	18%	44%	4%

12 Expense Management System Features Most Important To Your Company (Using a 5-point scale, with 1 being not important and 5 being extremely important)

	1	2	3	4	5
Automated policy flags to notify users	11%	4%	21%	21%	40%
Managers and approvers of violation	6%	3%	12%	26%	49%
Pre-population of credit card data	10%	3%	13%	14%	56%
Customizable reporting	7%	2%	20%	34%	35%
Receipt imaging	11%	6%	11%	32%	38%
Mobile capabilities	13%	12%	23%	26%	23%
Auditing automation	11%	7%	26%	28%	25%
Online booking integration	16%	7%	20%	25%	26%

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Expense Management System Features Most Important To Your Travelers

(Using a 5-point scale, with 1 being not important and 5 being extremely important)

	1	2	3	4	5
Automated policy flags to notify users managers and approvers of violation	17%	9%	28%	23%	20%
Pre-population of credit card data	9%	3%	16%	15%	56%
Customizable reporting	24%	24%	25%	13%	10%
Receipt imaging	7%	3%	8%	29%	51%
Mobile capabilities	11%	4%	11%	29%	42%
Auditing automation	27%	26%	27%	15%	4%
Online booking integration	12%	6%	23%	27%	29%

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Rating The Benefits Of Integrating Booking And Expense Data

(Using a 5-point scale, with 1 being not important and 5 being extremely important)

	1	2	3	4	5
Policy compliance	4%	2%	10%	27%	56%
Identifying booked to expensed variances	6%	3%	14%	37%	39%
Supplier negotiations	8%	2%	20%	31%	38%
Ease of exp. report prep for employees	4%	2%	12%	35%	44%
Enhanced data accuracy	5%	2%	10%	29%	52%

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Rating The Challenges Of Integrating Booking And Expense Data

(Using a 5-point scale, with 1 being the least difficult and 5 being the most difficult)

	1	2	3	4	5
Budget for integration	15%	10%	20%	29%	23%
Can't justify benefits	26%	14%	25%	20%	12%
Management support	16%	13%	25%	23%	20%
Technology incompatibility	17%	16%	25%	19%	20%
Identifying person/dept/company to lead integration	24%	14%	34%	16%	10%

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Where In Latin America Companies Manage Travel Spending

Brazil	78%
Mexico	72%
Argentina	57%
Chile	42%
Venezuela	27%
Other Latin American countries	40%

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Rate The Challenges Facing Companies Managing Travel In Latin America
 (Using a scale of 1 to 6, with 1 meaning not challenging and 6 meaning extremely challenging)

	1	2	3	4	5	6
Distribution of airline tickets	33%	4%	15%	24%	18%	3%
Hotel distribution	21%	8%	12%	24%	23%	11%
Supplier coverage	18%	9%	23%	21%	26%	3%
Transportation infrastructure	18%	7%	11%	21%	26%	15%
Tax regulations	23%	6%	7%	23%	23%	18%
National laws and regulations	20%	4%	7%	21%	21%	24%
Safety and security	12%	1%	4%	18%	23%	41%
Internal policy compliance	20%	6%	23%	15%	27%	9%

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Companies Have Aligned Global, Regional and Local Travel Decisions in Latin America

Yes	34%
No	30%
Working on it	36%

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Travel Programs and Policies Companies Have Implemented in the U.S. and Latin America

	US	Latin America
Online booking	88%	18%
Online expense reporting	75%	21%
Pre-trip reporting	48%	17%
Corporate card program	91%	36%
Required use of designated agency	84%	36%
Required use of airlines, hotels and other suppliers	74%	28%
Meetings management program	71%	4%