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# Forecasts And Trends Of 2023: Learnings from the past FOR our Future

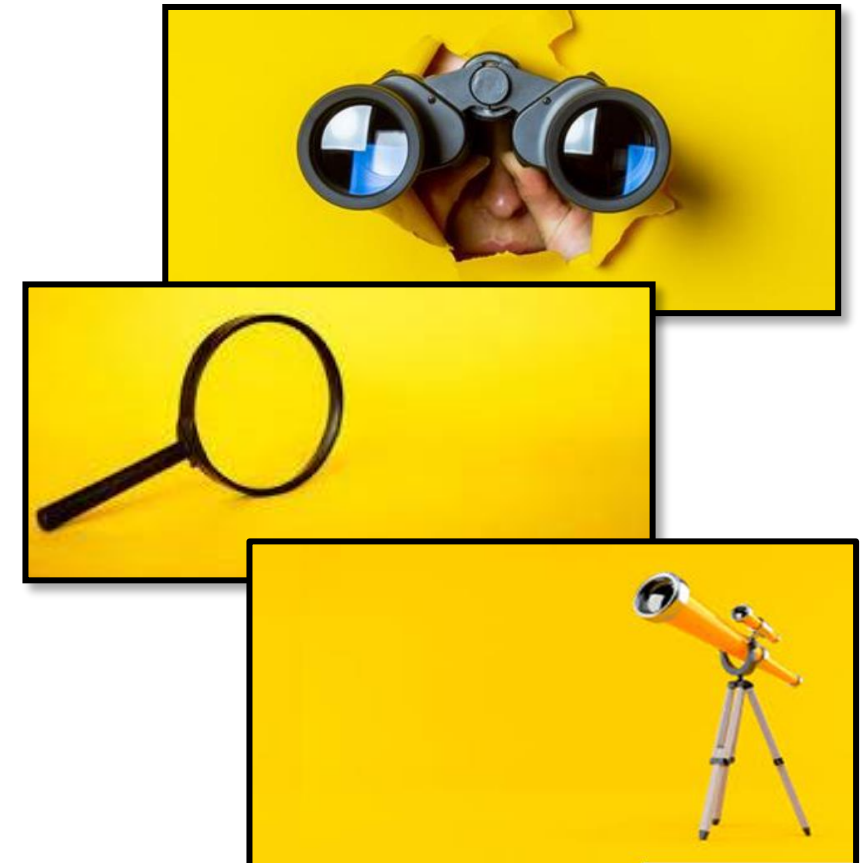
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# Our Agenda

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- Macro Trends
- Travel Strategy
- Industry Resets
  - Travel Policy
  - Supplier Contracting
  - Technology
  - Safety and Security Measures





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# Macro Trends

# Macro Trends

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- Continued M&A
- DE&I Prioritized
- Sustainability Rises
- AI and Machine Learning are Here
- Return to Travel is Volatile
- Technology first Considerations
- Traveler Experience is Back in Front
- Inspiration and Comradery Refreshed





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# Travel Strategy

# Strategy?

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Delta   
@Delta

Name a city that changed your life.

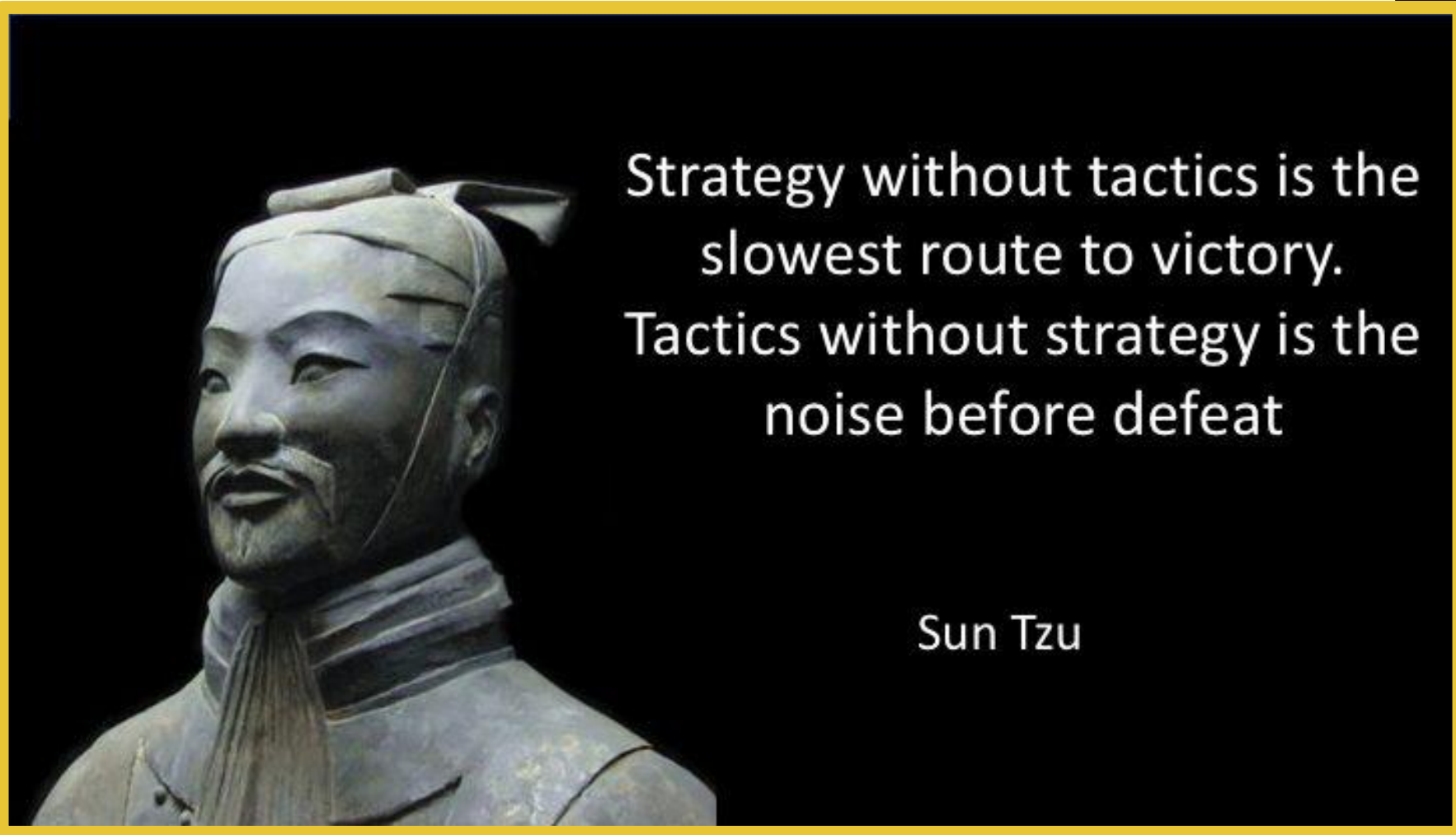
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**205** Retweets **5,328** Quote Tweets **2,556** Likes



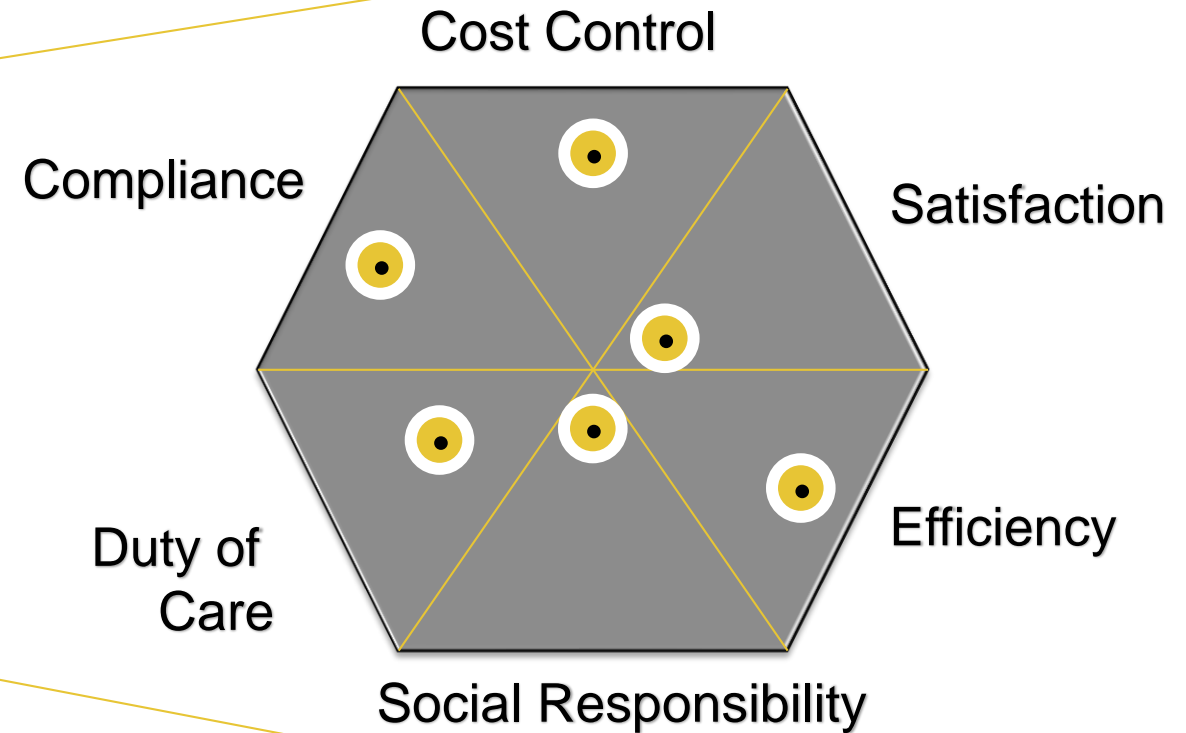
# Strategy and Tactics

7



# Strategy Drivers – What's Your Balance?

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# Strategy vs. Tactics

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## Strategy

- Intent
- What needs to be done and why
- High-level thinking
- Aligned with goals/objectives
- Defining the future
- Formed by leaders
- Focus on effectiveness
- Intangible

**Where you want to go**

## Tactics

- Putting intent into action
- How it must be done
- Concrete actions
- Aligned with strategy
- Day-to-day execution
- Executed by managers
- Focus on efficiency
- Tangible

**How you'll get there**



# Famous Strategies

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# Common Strategy Mistakes

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Front-loading your strategy

Ignoring culture

Relying on others to tell you what to do

Over-complicating strategy

# Travel Strategy Areas

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- **Company**
  - Governance
  - Cultural Alignment
  - Stakeholders
  - Communication
  - Alignment
  - Funding
- **Infrastructure**
  - Risk
  - Travel Team
  - Policy
  - TMC/OBT/Mobile
  - Meetings
  - Technology
  - Payment (Card and Expense)
  - Data / Reporting
- **Category**
  - Air
  - Lodging
  - Ground
- **Other**
  - Stakeholder Satisfaction
  - Dining
  - Parking
  - Performance Monitoring



# Aligning our Story





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# Travel Policy Reset

# Travel Policy Reset

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- Why Change?
  - Safety/Security
  - Talent War
- Health and Safety
  - PPE reimbursement
  - Quarantine/Isolations
- Air Travel
  - Non-Stop over Connections
  - Less Alternate Airports
- Lodging
  - Tiering Down
  - Mixed on Shared Accommodations



# Travel Policy Reset

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- Ground
  - Personal Use
  - Accepted Shared Rides
- Rail
  - Greener
  - Trips < 2 hours
- Process
  - Ticket Re-Use
  - Halt or Grow Digital Bookings
  - Pre-Trip Approvals





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# Supplier Contracting Reset

# Supplier Contract Reset

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- All
  - Vetting customers
  - Labor Challenges
  - TMC as platform v Third Party as Platform
- Airlines
  - NDC back on table (carrot v stick)
  - Tightening on targets
- Lodging
  - Increased Dynamic Focus
  - Continuous Sourcing
- Ground
  - Inventory Realignment
  - Electrification



# Supplier Contract Reset

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- Meetings Management
  - Small Meetings Roared
  - Self-Booking Tech Everywhere
- Charge Cards
  - Hyper-competitive
  - Virtual becoming mainstream
- Re-Shopping
  - Air
  - Hotels
- TMCs
  - Hybrid Pricing
  - Flexible to build solutions
  - Retaining customer's key



# Technology Reset

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- Customer Interfacing
  - AI/Machine Learning
  - 24/7 Base Expectation
- Distribution
  - NDC/NGS
  - Competitive Shopping
  - Purchasing Decision Analysis
  - Layered (Distributed) Costs
  - Requires Novel Scrutiny





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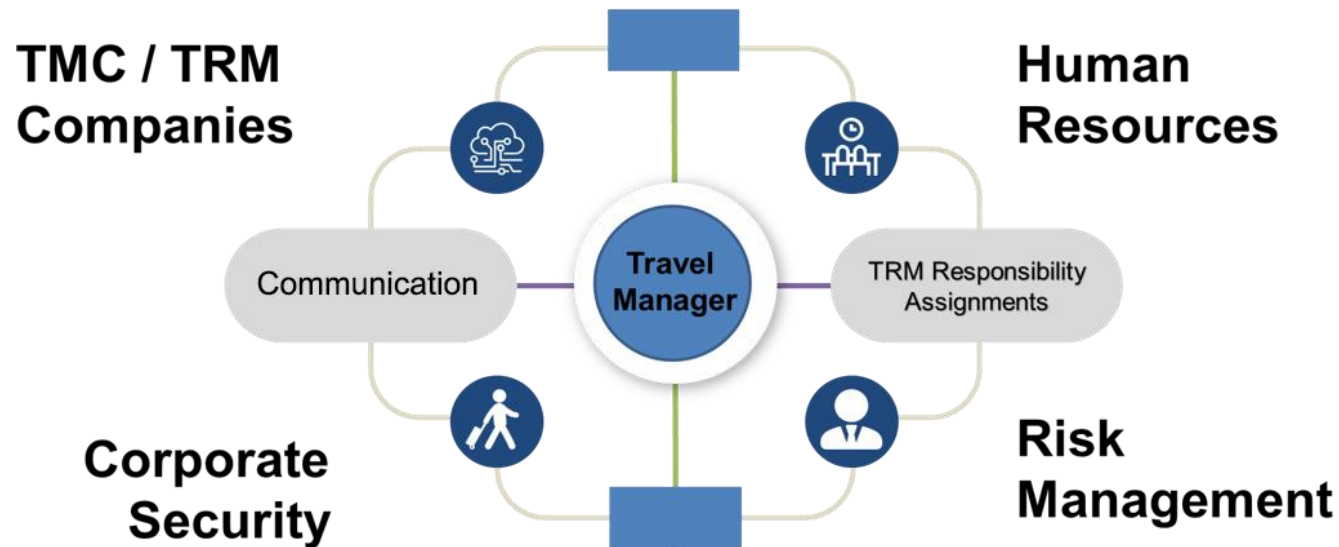
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# Safety & Security Reset

# Safety & Security Reset

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- Managed Travel Spotlight
- Third Parties Engaged
- Communication is VITAL





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**An Industry Reset:  
Managed Travel for 2023 and Beyond**

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