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APPENDIX A

**- ARTICLE PUBLISHED IN JOURNAL OF BUSINESS ETHICS AND
CONFERENCE ABSTRACTS -**

Violation of the Corporate Travel Policy: An Exploration of Underlying Value-Related Factors

*Anneli Douglas
Berendien A. Lubbe*

ABSTRACT. A travel management programme allows an organisation to manage corporate travel expenditure, and through a well-formulated travel policy, to control its travel expenses. However, traveller non-compliance of the travel policy is an increasing area of concern with surveys conducted amongst travellers showing various reasons for non-compliance, both deliberate and unknown. The purpose of this article is to look beyond the reasons and identify the underlying factors that influence travel policy compliance. Two broad categories of factors that lead to non-compliance are distinguished: those related to the corporate travel policy as formulated and communicated by the organisation, referred to as corporate-related factors and including issues of corporate culture and business ethics; and those related to the person of the corporate traveller, referred to as personal-related factors and including issues of personal ethics. This article makes a first attempt at identifying factors that have not previously been recognised in those industry or academic studies done on non-compliance or violation of the corporate travel policy.

KEY WORDS: compliance, corporate-related factors, corporate travel, corporate travellers, corporate travel management, personal-related factors, travel policy

Introduction

The high cost of business travel today is forcing organisations to find new ways to reduce travel expenses. One solution to reduce expenses may be to decrease the amount of travel done. However, this may reduce expenses but may have a negative impact on a company's ability to service, sell or maintain a presence with their customer base. Egan (2002) suggests that this may become a self-defeating initiative. Another solution is proper planning and

management of the travel programme through the development of an effective travel policy. Very few scientific studies have focussed on aspects related to corporate travel policies and compliance (Douglas and Lubbe, 2006; Lubbe, 2003; Mason, 2002), while industry has recognised this need and increased their surveys substantially in the last number of years (Airplus, 2006; Institute of Travel Management, 2006; Kirshner, 2005). This article takes a scientific approach by proposing a theoretical foundation which argues for a deeper analysis of the problem of traveller non-compliance. It goes beyond established reasons and argues that non-compliance may also be the result of underlying factors not yet fully investigated or recognised by management and industry in general. It suggests that before effective long-term measures can be taken to combat non-compliance, these factors need to be researched. Two broad categories of factors are identified and discussed from a theoretical perspective as a first step towards formulating a model against which non-compliance of the corporate travel policy can be empirically tested within organisations. The first broad category is termed corporate-related factors and the second, personal-related factors. For the purpose of this article, those factors that can lead to non-compliance but over which the traveller has little control can be regarded as corporate-related factors and generally include the travel policy stipulations and requirements. On the other hand, factors that lie within the personal control of the traveller can be regarded as personal-related factors. These can include the traveller's disposition towards ethical behaviour in specific situations, his or her ethical standards, the inherent honesty of the traveller as well as aspects such as the level of satisfaction that the traveller has

with his or her job, and even with his or her life in general, and the conditions under which he or she has to travel for business purposes.

The article begins with a brief overview of the purpose of the travel policy as a tool to manage travel expenses and discusses the extent and cost of non-compliance. Thereafter, the two categories of underlying factors are discussed in some depth, and the article concludes with suggestions for future research in this area.

The corporate travel policy and non-compliance

There are two main reasons why companies have travel policies. The first is to prevent travellers from over spending. The second is to demonstrate that the company has the mechanism to deliver spending commitments to preferred suppliers (Airplus, 2006). Rothschild (1988) explains that a written travel policy provides the framework for the way in which a company manages its travel. The policy document conveys a company's philosophy and its ground rules concerning travel – how it balances service for travellers on the one hand and cost efficiency on the other. Lubbe (2000) adds that the major purpose of the travel policy is to keep the cost of corporate travel within predictable and realistic parameters and to save the corporation money. According to business consultant – Caroline Ravenall – (personal communication), a regularly updated and enforceable travel policy can reduce overall travel and entertainment expenditure by between 20 and 30%. Ravenall (personal communication) further argues that a 5% increase in policy compliance relates to a 10% reduction in travel costs. Thus, as compliance with the travel policy increases, travel expenditure will decrease. It also serves a secondary purpose of allowing travellers to understand exactly what the limitations are in terms of choices and alternatives. Travel policies provide the traveller with the financial security of knowing what will be reimbursed and what is allowed in terms of expenditure. More recently, Kirshner (2005) suggested that establishing, communicating and reviewing the corporate travel policy remains essential to creating a successful travel programme, but that a more stringent negotiating environment and continued security concerns have brought policy compliance to the top of the list of travel management priorities.

Tracking compliance is an integral part of any policy. Containing costs often becomes as simple as communicating with travellers about doing the right thing (American Express, 2007).

A corporate travel policy is an essential tool for controlling both direct and indirect travel and entertainment (T&E) expenditure, yet industry experience suggests that a significant number of companies are failing to implement adequate policies, or are failing to enforce a policy where it is in place (Sausser, 2003). According to Campbell (2002) there are always exceptions that could be found for not complying with the corporate travel policy and travellers are starting to find more of them. He notes that as policies are becoming more restrictive, they become more difficult to comply with all the time. A global survey by flight schedule publisher OAG Worldwide showed that, on average, employees violate the corporate travel policy on one trip in six (Cohen, 2000). A survey on corporate travel management in selected South African organisations found that only 22% of organisations surveyed reported that travellers comply with the travel policy 100% (Lubbe, 2003). Reasons for traveller non-compliance range from deliberate infringement as a result of last-minute bookings, the use of personal loyalty cards, to unknowing infringement of the policy due to a lack of knowledge on its conditions (Douglas and Lubbe, 2006). Recent studies, in the USA, have estimated the average compliance cost for companies at about \$3 million a year (Hulett, 2005). In North America, more than 55% of business travellers said they book outside of their company's travel policy at least once a year (Btt Bulletin, 2006). A research study undertaken by ACTE and KDS in 2006 estimates that almost one in five T&E expenses is non-compliant with company policy (Association of Corporate Travel Executives, 2006). The Institute of Travel Management (2006) found that non-compliance also has a significant impact on travellers. These impacts include reduced security and no access to 24-hour service as well as self-payment by travellers for corporate travel expenses. Travellers are generally oblivious to the costs of non-compliance and are generally unaware of the ramifications (Btt Bulletin, 2006). In the Btt Bulletin study (2006) travellers were asked if there are ramifications to their company if they consistently booked outside of the corporate travel policy conditions. Almost half of the respondents indicated that they believed there

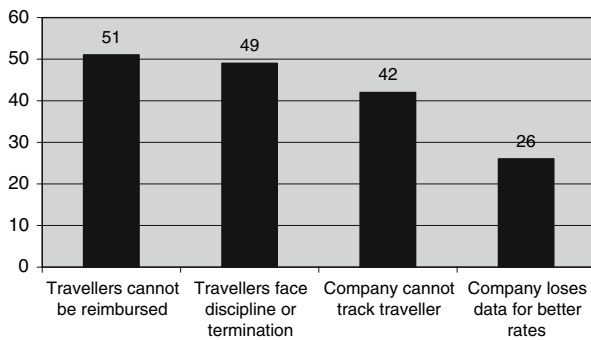


Figure 1. Ramifications for non-compliance. Source: Btt Bulletin (2006).

were no ramifications. When asked about specific ramifications, responses varied as shown in Figure 1. Specific ramifications to travellers of non-compliance include: they cannot be reimbursed for travel and entertainment expenses; they face discipline or outright termination; the company will not be able to track traveller whereabouts in an emergency; and, the company loses data for better rates with travel suppliers.

A number of studies, both internationally and in South Africa have identified some of the most important reasons for non-compliance. Business travellers who book outside of the corporate travel policy responding to an American Express (2007) survey cite many reasons for doing so, but the reason most commonly indicated is that the preferred airline's scheduled flight times do not meet the traveller's business needs (24%), followed by "the preferred airline causes the traveller to take specific connections", and "the preferred hotel is not close enough to where the traveller is doing business" (both at 12%). In South Africa seventy eight percent of organisations are of the opinion that last minute bookings are a reason for non-compliance, 69% agreed that unknowing infringement by travellers is a reason while 54% indicated the use of personal loyalty cards (Lubbe, 2003). The survey done by Douglas and Swart (2003) supports these results, with 61.9% of respondents agreeing that last minute bookings are the main reason for non-compliance, as shown in Figure 2. In 2006, Douglas and Lubbe reported the following as reasons why travellers do not comply with the travel policy: last minute bookings by travellers, followed by personal loyalty

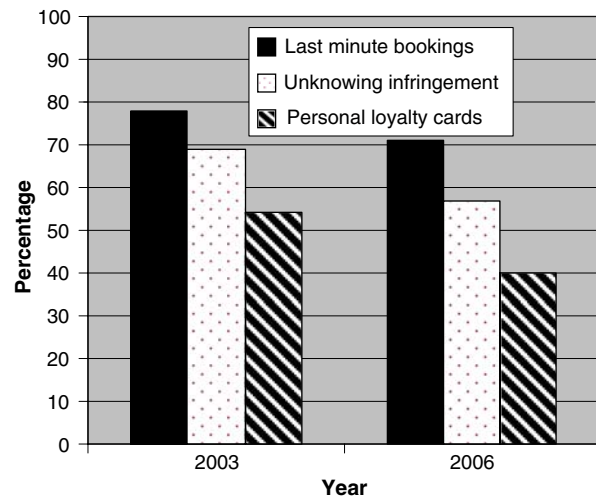


Figure 2. Reasons for non-compliance with the policy (2003 and 2006). Sources: Douglas & Swart (2003); Douglas & Lubbe (2006).

cards held by travellers, and unknowing infringement of the travel policy by travellers (indicated in Figure 2).

The reasons provided are important and valid but do not necessarily reflect all the motives for non-compliance. Non-compliance may also be the result of underlying factors not yet fully explored or recognised by management and in this article it is argued that before effective long-term measures can be taken to combat non-compliance, these factors need to be identified. In the next two sections, these underlying factors that might influence corporate travellers' compliance with the travel policy will be proposed. As explained in the introduction these factors are broadly classified into two categories: corporate-related factors and personal-related factors (Figure 3).

Corporate-related factors

For the purpose of this article, corporate related factors that influence the corporate traveller's compliance with the travel policy can be explained as organisational factors or rules and regulations imparted by a company as set out in the travel policy, over which the employee has little control. Three important concepts are identified which relate to the formulation and "spirit" of the travel policy.

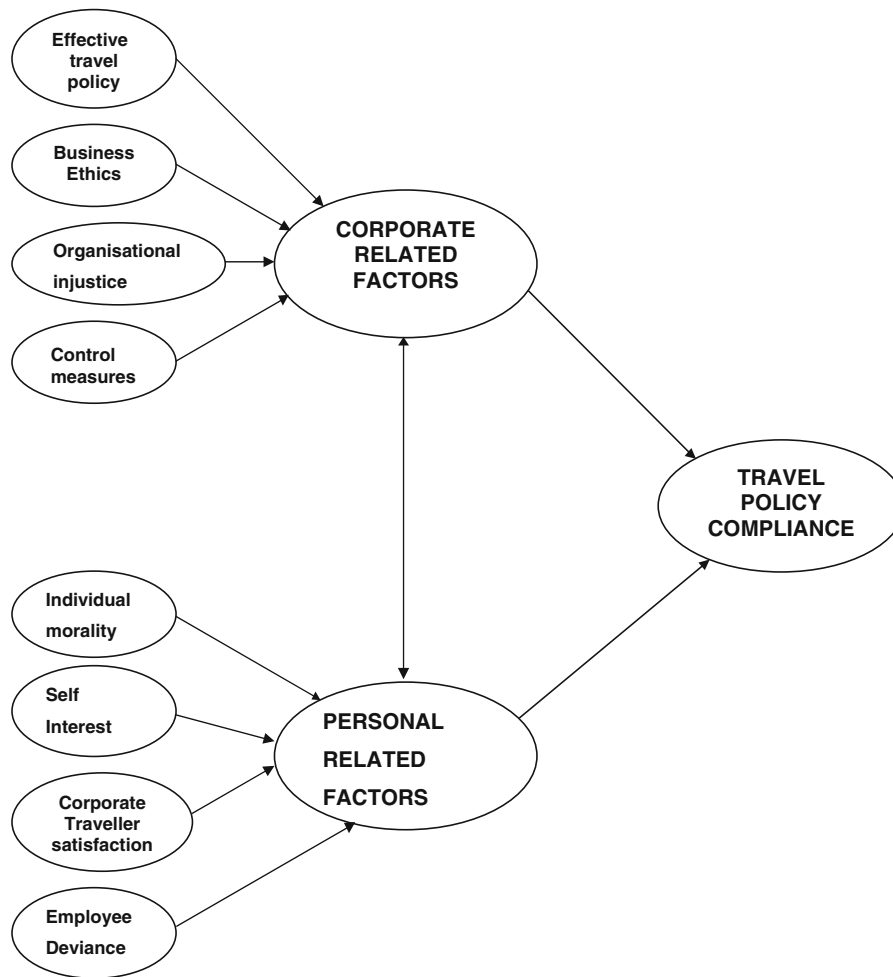


Figure 3. A model for travel policy compliance.

These are an organisations business ethics as reflected through the organisational culture, the content and communication of the travel policy and the monitoring of business travellers' behaviour. In the discussion on the first concept, business ethics, the relationship between organisational culture and individual behaviour is highlighted and five types of companies as proposed by Rossouw and Van Vuuren (2003) are identified according to their management of business ethics. From this it is postulated that different types of companies will probably have different types of travel policies. The second concept, travel policy and non-compliance will be viewed from the perspectives of clarity, communication and senior management commitment to its effective implementation. The final concept, the monitoring of traveller behaviour will be discussed in terms of reporting measures.

Business ethics

Typical definitions of business ethics refer to the rightness and wrongness of behaviour, but not everyone agrees on what is morally right or wrong, good or bad, ethical or unethical. According to Lewis (1985) business ethics are moral rules, standards, codes or principles, which provide guidelines for right and truthful behaviour in specific situations. In the context of this study this would be reflected in the behaviour of the corporate traveller in a business travel situation. Scott (2003) argues that many models of behaviour in organisations suggest that there are both organisational and personal reasons for individuals' behaviours. However, these models depict the person and organisation as independent variables, suggesting that employees and organisations are randomly assigned to each other. Scott (2000) says that

employees choose organisations, often based on the fit of their moral values with those of the organisation. This means that the values of employees are not independent of those of the organisation even from the point of initial application decisions. This initial sorting is further refined because organisations also choose employees. Recruitment and socialization techniques result in some degree of homogeneity in organisations' employees (Chatman, 1991; Schneider, 1987). This suggests that the characteristics, views, values, and capabilities of the employees are, at least in part, selected, trained, or encouraged by organisational values and characteristics. Behaviour by employees, at least as part of their organisational roles, may thus be partly dependent upon organisational characteristics. The persons engaging in dishonesty, the types of dishonesty they engage in, the potential consequences, and the potential victims of dishonesty all are not necessarily *caused* by the organisation, but they are not completely independent, either. According to Sinclair (1993) an examination of organisational culture offers a plausible explanation for the incidence of unethical behaviour. Unethical behaviour is often attributed to the defective moral upbringing of an individual. Such individuals are termed "bad apples" as it is believed that their upbringing has determined their moral character and they cannot be changed into morally sensitive individuals (good apples). Individuals are affected by their social setting in the same ways as apples may be placed in different barrels. Apart from upbringing, the social settings or organisations (barrels) that individuals work in can also have either a good or corrupting influence on their moral character. People with dubious or even good moral characters can turn to unethical behaviour if they find themselves in organisations where unethical conduct is the norm. Thus, bad barrels can corrupt dubious or even good apples. The opposite is equally true. Dubious or even bad apples can be restrained from unethical behaviour should they find themselves in organisations that do not tolerate unethical behaviour, but reward ethical behaviour (Rossouw, 2006).

Rossouw and Van Vuuren (2003) identify five categories of organisations according to their modes of managing morality. They call this the "Modes of Managing Morality" model. In this model organisations are classified according to their specific way of dealing with ethics. A mode can be described as the

"preferred strategy of an organisation to manage its ethics". The preferred mode reflects the decisions its leaders make to ignore ethics and to act unethically or actively to deal with ethics in an overt manner. Organisations deal with ethics in different ways, ranging from superficial unethical "window-dressing" where corporate ethical values remain only words on paper to concerted efforts to "institutionalise" ethics, by making every employee in the organisation responsible for ethical management. Rossouw and Van Vuuren (2003) suggest that five relatively distinct modes can be discerned in describing organisations' preferred strategies for managing ethics. The model consists of the modes of immorality, reactivity, compliance, integrity and total alignment (Rossouw, 2006). As is shown in Table I, each mode is described in terms of its nature, primary purpose, predominant strategy and typical challenges. The challenges that arise within each mode provide an explanation for the change in mode of managing ethics that typically occur within organisations over time. These challenges arise when organisations sense that they may have exhausted a specific mode's potential for managing ethics (Rossouw and Van Vuuren, 2003).

With specific reference to this study, the strategy that an organisation uses to manage its ethics in terms of its influence on travel policy compliance is examined. In analysing an organisation's travel policy in terms of its level of control in influencing traveller behaviour, it seems logical that there should be a discernible relationship between the type of travel policy that an organisation utilizes and the strategy the organisation implements to manage its ethics. Corporations generally follow one of the three types of policy: low control, medium control or high control of travel planning and expenditure in an organisation. A travel policy that is loosely defined in terms of the travel requirements of corporate travellers can be regarded as a low control policy. One that emphasises authorisation of all travel expenditure, strict reporting procedures, precise procedures for arranging travel and adherence to specific regulations pertaining to personnel levels and travel benefits can be regarded as a high control travel policy (Jenkins, 1993). Table II provides a concise example of some of the components of the different types of policies.

TABLE I
The modes of managing morality model

Dimensions of comparison	Immoral mode	Reactive mode	Compliance mode	Integrity mode	Totally Aligned Organisation mode
Nature	Unethical conduct is good business The business of business is business and not ethics	Token gesture of ethical intent is shown (a code of ethics) Unethical behaviour is ignored and remain unpunished	Commitment to manage and monitor ethics performance <i>Rule based approach</i> to ethics Disciplining unethical behaviour	Internalisation of ethical values and standards <i>Value based approach</i> to ethics Internal locus of (ethics) control; “walking the ethics talk”	Seamless integration of ethics in corporate purpose, strategy and operations Non-negotiable morally responsible interaction with stakeholders
Purpose	Ethics has no place in the singular pursuit of the bottom line Unethical behaviour espoused as good business	Protection against dangers or unethical behaviour Sceptics and critics are silenced (temporarily) by the existence of ethics standards	Prevention of unethical behaviour Desire to have a good ethical reputation	Raising level of corporate ethical performance Pro-active promotion of ethical behaviour Ethics of strategic importance or a competitive edge	Ethics reinforced as part of culture and purpose Ethics entrenched in discourse and decision making
Ethics Management Strategy	A Machiavellian orientation exists that denies the need to make decisions concerning ethics No concern for stakeholders No ethics management strategy or interventions	Laissez-faire ethics management Inability to manage ethics Corporate (ethical) values are words on paper	Transactional approach to managing ethics Code clear and comprehensive & corporate ethics management function exists Ethics management system used Unethical behaviour punished	Transformational approach to managing ethics Stakeholder engagement Ethics “talk” prevails High level ethics management functions and systems Managers have an ethics competence	Everyone responsible for ethics management Ethics function/ office serves as “rudder” Ethical heroes celebrated, ethics stories told Elimination of discrepancies between corporate values and behaviour

TABLE I
continued

Dimensions of comparison	Immoral mode	Reactive mode	Compliance mode	Integrity mode	Totally Aligned Organisation mode
Challenges	Financial consequences of immorality becomes unaffordable Increased dissonance between personal and corporate values Stakeholders experience alienation	Credibility problems with stakeholders Susceptible to ethical scandal Stakeholders convey frustrated expectations Corporate ethical reputation below par	Mentality of “what is not forbidden is allowed” Personal moral autonomy and responsibility undermined Proliferation or ethical rules and guidelines Employees disempowered to use ethical discretion	Discretion granted is abused Moral autonomy leads to moral dissidence Powerful leaders undermine ethics drive Lack of clear corporate identity undermines integrity mode	Ethical complacency/ moral arrogance; moral laxness Neglect ethics induction of new employees Lack of co-ordination in managing ethics

Source: Rossouw and Van Vuuren (2003).

In analysing the nature and purpose of the compliance-mode organisation, it would appear that the high control policy would reflect the organisational culture. In this respect, it is a rule-based approach and has a strategy of monitoring behaviour and disciplining unethical behaviour. A compliance mode organisation would probably utilise a high control policy as they have a commitment to manage and monitor ethics performance and they have a rule-based approach to achieve ethical behaviour. The integrity mode would probably employ a medium control policy, as they believe in the internalisation of ethical values and standards. They rely more on the individual values of a traveller to comply with the policy and less on the rules of the policy. Conversely, the reactive mode would also employ a medium control policy, in order to show a token gesture of ethical intent (by having a policy) as well as to silence the critics by the existence of ethics standards. The immoral mode would probably make use of a low control policy, as they believe that ethics have no place in the business and denies the need to make decisions concerning ethics. In addition, they have no concern for stakeholders and no ethics management strategy or interventions. On the other hand, the totally aligned organisation mode would also make use of a low control policy. That is because there is a seamless integration of ethics in corporate purpose, strategy and operations and ethics is entrenched in discourse and decision-making of employees. Thus, the company does not need a high control policy to force travellers to comply; the traveller makes his own ethical choice to comply with the policy.

The travel policy

An effective travel policy is dependent on three elements: clarity, communications and, perhaps most important, senior management commitment. The most common cause of non-compliance is a poorly written policy. Many policies are written with too many grey areas, if the traveller can argue that the policy is wrong, it can be difficult to enforce (Cohen, 2000). According to Samee (2004) a policy that is too strict can also lead to non-compliance. Another factor that could lead to non-compliance is if the corporate travellers do not understand their

TABLE II
The types of travel policies

Travel component	Low control travel policy content	Medium control travel policy content	High control travel policy content
Airline class of service	Domestic – economy class International – business class First class – for directors only	Domestic – economy class International – business class First class – authorisation required	Domestic – economy class International – economy class for less than five hours; business class for more than five hours First class – authorisation required
Airline choice	No mention	Traveller may choose	Must fly specific airlines
Frequent flyer benefits	Traveller allowed to keep benefits	Benefits belong to the company and should be handed in	Benefits go straight to the company
Rental cars – Class	No class specified	Compact, fuel-efficient cars	Economy cars only
Expense reports	Completed and signed by supervisor	Completed and signed by supervisor within 7 days of return	Completed within 7 days, all expenses must be explained

Source: Adapted from: Jenkins (1993).

company’s travel policy (American Express, 2002; Douglas, 2005). In order to comply, travellers need to understand what the policy is and it needs to be communicated to them (Slaughter, 2003). In his research, Mason (2002) shows the differences in views between travel managers and their travellers when considering aspects of the corporate travel policy. It would seem that travellers view travel policies as being much more flexible than their travel managers may have intended. In his study, 42% of travel managers described their policies as “airline and class level rules to be strictly followed.” Only 16% of the travellers agreed with their travel managers, whereas 44% of travellers described their policies as “policies to be followed where possible.” Many corporate travel buyers are of the opinion that the proliferation of low rates by transportation and lodging suppliers in their own booking channels have weakened compliance. Often, corporate travellers find a non-preferred supplier on the web at a lower rate, and book it. Although the travellers are attempting to save money for the company, they are out of policy and that contradicts the true purpose of what the policy is aiming to do (Campbell, 2002).

The involvement of divisional budget managers can have a greater impact on compliance than the travel manager. Too many travel managers have focussed on distributing the policy from the bottom up, but lacking senior management understanding. Travel managers spend a lot of energy and time trying to distribute the information to travellers using their portal or newsletters, but when the travel manager tries to communicate from the bottom of the pyramid, he will not be as efficient as he would by going to line managers (Campbell, 2002).

An additional aspect of the travel policy that has an impact on policy compliance is the decision on the allocation of loyalty points (Campbell, 2002; Douglas and Swart, 2003; Lubbe, 2003; Mason, 1999). Campbell (2002) says that loyalty programmes have weakened compliance. A traveller who receives loyalty points might decide to take the most expensive flight in order to earn more loyalty points, instead of the cheaper flight. At the same time, a traveller might be tempted to fly with an airline of which he is a loyalty card member, although the chosen airline is not a preferred supplier of his company. This fact was substantiated by

research conducted by Mason (1999) that revealed that individual travellers might be adverse to corporate influence in their travelling behaviour. Corporate choices may be contrary to the preferred choice of the traveller if the traveller is a member of a frequent flier programme (FFP), or if the choice of airline is perceived to reduce the travelling, comfort, flexibility, status, or convenience. Furthermore, if policy stipulations are not consistently applied and applicable to all personnel levels this could also lead to non-compliance. A study done on the management of corporate travel in South Africa supports this. In the study, corporate travellers agreed that they do not comply with the policy either because senior management does not comply or because the travel policy is unfair and that all travellers are not allowed the same treatment (Douglas, 2005). Another factor to consider is the seniority of travellers. According to Campbell (2002) the lower levels of traveller are always more inclined to compliance than higher level employees.

Monitoring the business traveller's behaviour

According to Northstar Travel Media Research corporate travellers break the policy because it is easy to get away with it (Samee, 2004). Monitoring compliance – by using a combination of pre-trip approvals and post-trip reviews from management – is often neglected. As a result, employee compliance with travel policy is low. Without full compliance, per trip information on costs, vendors, dates and locations is lost (Crane, 2001). Corporate card programmes can also improve policy compliance by providing management information that identifies out-of-policy expenditure. The breakdown of expenditure information that such cards provide can be used to monitor travel patterns and to highlight deficiencies in the travel policy. Using this information, the company can then amend the travel policy to ensure it supports travel patterns and travel needs and consequently increase travel policy compliance (Hans et al., 2003). If the pre-trip approvals and post-trip reviews from management are neglected or if corporate card programmes to track out of policy expenditure are not in place, corporate travellers will break the policy because it will be easy to get away with it.

Organisational injustice

Aquino et al. (N.d) are of the opinion that organisational injustice presents strong situational cues that motivate people to engage in unethical workplace behaviour. According to Cohen (2000), some corporate travellers break the rules of the travel policy simply to be wayward. The travel policy is an ideal opportunity to express rebelliousness through relatively trivial transgressions of company rules. This was substantiated by a South African survey on corporate travel, where 42% of the organisations agreed that the travel policy was deliberately infringed (Lubbe, 2003). This might also elucidate the 24% of corporate travellers explaining their unethical behaviour by saying that their company owes them extra compensation for the time and hassle involved with business travel (Samee, 2004). Revenge against the organisation is a very common theme in the dishonesty literature. Greenberg (1990, 1993) and Greenberg and Scott (1996) finds that employees who perceive that they have been treated inequitably by the organisation are more likely to steal from the organisation. Others have found similar results (Lewicki et al., 1997; Shapiro, Lewicki & Devine, 1995 in Scott, 2003). The second category of factors that influence a traveller's compliance with the travel policy could be termed: personal related factors. These factors investigate the psyche of the traveller to understand his/her reasons for non-compliance.

Personal-related factors

The next category of factors that could influence compliance with the travel policy is labelled personal related factors. These factors relate to the needs and values held by corporate travellers and include matters such as the honesty of a traveller, the extent of morality that a traveller possesses, actions related to self-interest and the level of satisfaction that the traveller enjoys with life in general, his/her job and his/her travelling for business reasons.

Individual morality

People make moral decisions in different ways. The most common theory of moral development was

created by Kohlberg, and suggested that people go through a series of levels as they mature. These morality levels include the pre-conventional level, the conventional level and the post-conventional level. He argued that most adults are guided by rules and regulations when they make moral decisions. For example, if the rule is that a certain airline must be used for company business travel, most adults use that rule as their primary criterion for choosing an airline. The trouble with this level of conventional moral reasoning is that ethical dilemmas in life are not codified. The rules do not always apply: rules are ambiguous, and different rules exist in different places (Grover, 2005). Moral maturity affects whether or not people lie in various situations. People working from a set of principles are less likely to be influenced by particular situations. In contrast, those using conventional moral reasoning are often perplexed when they face conflicting demands. Shepard and Hartenian (1991) identified lying, cheating, and stealing as the key unethical behaviours in organisations when they developed an unethical behaviour measurement instrument. Opportunity is a situational ingredient that promotes lying. People are not so likely to lie when they are obviously going to be caught. Social scientists have repeatedly found that most people are dishonest when given the chance (Grover, 2005). Thus, if a traveller is given a chance to breach the travel policy, he will do so. Samee (2004) confirms this by saying that corporate travellers breach the travel policy when it is easy to get away with it. Some people may have pathological tendencies toward lying; others may lie when instructed to do so by a superior; and still others might lie as revenge in response to anger. The pathological liar needs no cause to lie; a boss experiencing conflict may tell the subordinate to lie, and the lie or revenge may be construed as a response to some sort of conflict between personal values and organisation allegiance.

Northstar Travel Media Research recently surveyed a random sample of 300 business travellers throughout the United States on their travel habits and preferences. According to the survey, 30% of business travellers falsify their expense reports. Of those, 10% do so for every business trip that they take, and 33% add on an additional \$100 or more above actual costs. Respondents to the Northstar Travel Media Research cited various rationales for this behaviour:

- Forty three percent said that their company's spending guidelines are so tight that travel costs them out-of-pocket money.
- Twenty eight percent do so because it is easy to get away with it.
- Twenty four percent said that their company owes them extra compensation for the time and hassle involved with business travel. (Samee, 2004)

According to an American Express survey, many corporate travellers believe falsification of charges submitted for reimbursement on expense reports is common. More than one-third of respondents felt it was "somewhat" or "quite" common for business travellers to submit an expense report with "one or more completely false or spurious charges." (American Express, 2005). Frequent Flyer Programmes also pose significant ethical quandaries to corporate travellers. According to Deane (1988) an employee with significant award points in a particular airline's programme may be induced to choose that carrier for an upcoming trip even though the trip could be made more conveniently, efficiently or economically on another carrier. In addition, there may be an incentive for an employee to take a less efficient or more costly routing on the same carrier merely to build up points. In his research, 95% of travellers surveyed personally receive frequent flyer miles from company paid travel. Approximately 80% of these business travellers receiving points do admit that frequent flyer membership is at least sometimes a factor in choosing travel services. Dettinger (1985) in Deane (1988) further reports that 25% of the frequent travellers admitted taking trips that were totally unnecessary in order to build up point awards. In a survey of 520 travel agents in the US, the General Accounting Office found that 57% said their business clients "always or almost always" choose flights on the basis of frequent flier programmes. An additional 24% of them said that their clients do so "more than half the time" The problem arises because employees are no longer concerned with the cheapest and most direct route in choosing which airline to fly, but rather, they are concerned with which frequent flier club they belong to and how many more miles they need to receive a free ticket (Lansing and Goldman, 1996).

Self interest

The self-interest paradigm predicts that unethical behaviour occurs when such behaviour benefits the actor (Grover, 2005). Theorists who have grappled with the determinants of lying behaviour have generally relied on the self-interest notion: people will lie when doing so benefits them (Grover and Hui, 1994). According to Mason and Gray (1999) a corporate traveller will have a list of personal wants when travelling on behalf of his company, including to have perceived status (e.g. through use of business class). When the travel policy does not permit flying in business class, the employee could possibly decide to breach the travel policy by booking business class, in order to achieve this perceived status. When acting in this manner, the employee lies because it benefits him to do so. Scott and Jehn (1999) further support this argument by suggesting that self-enrichment could be a possible motivation for dishonesty. As is evident from the above discussion, the potential for savings is greatly affected by company employees' cooperation with a travel department's efforts to apply travel policy, but employees can always make excuses for not following guidelines on the basis of their specific needs on a business trip (Amster, 1986). Hotel chiefs have warned travel management firms and corporates that business travellers will disregard company travel policies to stay in the hotels they prefer. If customers have had good experiences with a particular hotel brand, they are likely to return to that company when conducting business travel – regardless of corporate policy. It all goes back to the customer experience. Despite the office procedure, a customer will come back to the hotel they have had a good experience with (Crawshaw, 2005). The company can save travel expenditure only when corporate travellers comply with the travel policy. If the travel policy does not address their needs, corporate travellers are not likely to comply with the travel policy. It can be assumed that corporate travellers will comply with the travel policy if their travel needs are satisfied by the policy.

Corporate traveller satisfaction

For the purpose of this research satisfaction will be defined as to: meet the expectations, needs, or desires and to fulfil a desire or need. From a cor-

porate traveller perspective, satisfaction may depend on three areas. First, the traveller's satisfaction with his/her life in general; second the traveller's satisfaction with his/her job and third the traveller's satisfaction with the conditions under which he/she travels on behalf of the company.

Life satisfaction can be defined as a global evaluation by the person of his or her life. It appears that individuals “construct” a standard, which they perceive as appropriate for themselves, and compare the circumstances of their life to that standard (Pavot et al., 1991). Studies indicate that people are satisfied with their lives to the extent that their needs and values are satisfied (Abbott, 2002; Karl and Sutton, 1998; Locke, 1976; Myers and Diener, 1996). According to Myers and Diener (1996) four traits characterise happy people. First, they have high self-esteem and usually believe themselves to be more ethical, more intelligent, less prejudiced, better able to get along with others, and healthier than the average person. Second, happy people typically feel personal control. Those with little or no control over their lives suffer lower morale and worse health. Third, happy people are usually optimistic. Fourth, most happy people are extroverted. Although one might expect that introverts would live more happily in the serenity of their less stressed, contemplative lives, extroverts are happier – whether alone or with others. If people are not utilized and managed properly in organisations, it is unlikely that organisations will reach their full potential. This may lead to a phenomenon that is not uncommon in corporate life, namely widespread job dissatisfaction. *Job satisfaction* can be described as an affective attitude of dislike towards one or more job related dimensions. Since attitudes and negative attitudes in this case, are reasonably good predictors of behaviour, a wide variety of consequences, from mild to destructive may follow. Dissatisfied people may engage in psychological withdrawal or even overt acts of aggression and retaliation. Besides the negative effect of job dissatisfaction on performance, it also has a number of other detrimental consequences. These include high employee turnover, absenteeism, tardiness, theft, violence, apathy, sabotage, fraud and corruption (Rossouw, 2006). From an employee's standpoint, job satisfaction is a desirable outcome in itself. According to Edwin Locke (1976), job satisfaction results from the perception that one's job fulfils or

allows the fulfilment of one's important job values (Karl and Sutton, 1998). In addition, the study done by Karl and Sutton (1998) suggest that today's workers place the highest value on good wages and job security. A comparison of public and private sector workers revealed private sector workers place the highest value on good wages, while public sector workers valued interesting work the most. According to a study by Abbott (2002), the following factors lead to low morale and low job satisfaction: disillusionment about management, long hours and work/life balance. These factors combined made respondents feel that the company did not care. More personally, respondents felt that their management had neither time nor inclination to listen to them. Lack of empowerment was also a problem, especially as people expected to be empowered in their jobs, but in reality were not. A *satisfied traveller* is someone whose needs have been satisfied optimally. Corporate travellers have very specific needs with regards to the tangible aspects of travel, these relate to air transportation, accommodation and technology. In addition, they also have intangible needs referred to here as psychological needs.

Tangible needs

Technology helps a corporate traveller to stay on top of his workload. They require access to email and a laptop when travelling on behalf of their company. Self-booking tools are another technological development that is becoming very popular amongst corporate travellers. Some travellers believe that converting in-person meetings to travel alternatives using voice, web, and video conferencing would allow them to improve their business performance and personal lives, while others are of the opinion that travel and personal contact is still regarded as the most effective way of conducting business (Douglas, 2005; Lehman and Niles, 2001; Lubbe, 2003; Mason, 2002). When making use of air transportation the three most important factors for corporate travellers are on-time performance, comfort and service. For corporate travellers the worst aspect of business travel relates to air transportation, they are demanding improved facilities at airports, while wasted time at airports is a major frustration. Although mobile working is clearly on the increase,

many corporate travellers still consider flying to be a time to relax from the pressures of work. Furthermore, some travellers are more interested in saving money than seeking comfort while on the road doing company business but are not willing to suffer to achieve that end. When considering the air transportation needs of corporate travellers it is also imperative to note that frequent corporate travellers and infrequent travellers have inconsistent needs, while the needs of males and females also differ (Alamdari and Burell, 2000; Evangelho et al., 2005; Fourie and Lubbe, 2006; Mason, 2001; Mason and Gray, 1999). Wishing – or needing – to be more industrious and productive while travelling on company business, many business guests in hotels have come to require much more than a quiet room. They increasingly want accommodation establishments to be not so much home from home but offices away from the office (Davidson and Cope, 2003). Researchers agree that the following attributes are important to corporate travellers when selecting an accommodation establishment: cleanliness, location, service quality, security and friendly staff (Douglas, 2005; Douglas and Swart, 2003; Knutson, 1988; McCleary et al., 1993; Weaver and Oh, 1993).

Another aspect of traveller needs that requires more research and could be explored further in a next article is that of safety and security. According to Grossman (2007, p. 39) the number one concern for most business travellers is safety and security. Some travellers may avoid using an airline because of perceived safety problems of the airline despite corporate travel policies that may require the use of that specific airline. Additionally, company policies requiring use of compact fuel efficient rental cars or economy cars for corporate travel may lead some travellers concerned with safety to infringe company travel policies due to perceived less favourable safety records of economy or compact fuel efficient cars. For companies, it is imperative to know where their employees are at all times. Although systems with very strict rules and regulations might exist in companies, corporate travellers can easily avoid these systems, especially when they make their own changes en route. The whereabouts of these employees would then be unknown. In order for companies to keep their employees safe, only reliable and reputable suppliers should be used for undertaking travel, no matter what the costs. By sup-

porting trustworthy suppliers, companies will have more peace of mind when sending their corporate travellers on business.

Intangible needs

Travellers also have particular psychological needs. Corporate travel is often a positive experience but regrettably, frequent work-related travel may also have negative consequences. In order to ensure that a traveller's psychological needs are being satisfied employers should eliminate unnecessary trips and avoid travel on weekends and special occasions. Corporate travel should not take priority over other needs in employee lives, because this could cause undue stress within the family circle. Most travellers also signify a preference for formally approved time off after business trips. Part of the psychological needs is the need for security that is becoming increasingly important to corporate travellers. Travellers want to feel secure and safe when travelling for business purposes (Institute of Travel Management, 2006).

Conclusion

In this article factors that influence the corporate traveller's compliance with the travel policy were recognised. These factors were identified into two categories: corporate related and personal related. Based on the identified factors a framework can be graphically presented that depict the constructs for measuring traveller compliance. Future research is needed to test the validity of the framework. If the framework proves to be valid, the constructs could be used to measure traveller compliance. Based on the results, a company can formulate a travel management programme that will enhance policy compliance. The current study has laid the foundation for such.

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Tourism Management,
University of Pretoria,
Pretoria, Gauteng, 0002, South Africa
E-mail: anneli.douglas@up.ac.za



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**The fifth International Conference on Ethics in the Public and
Private Spheres**

The impact of business ethics on corporate travel policy compliance

Ms Anneli Douglas

Prof Berendien Lubbe

University of Pretoria

South Africa

Public and private sector organisations are increasingly concerned about policy violations in the business travel domain. The result of such violations is not only reflected in the rising cost of travel to organisations, but has a further consequence, particularly for public sector organisations where the perception of abuse of privilege by government officials is created. Studies have also shown a higher rate of deliberate travel policy violation in the public sector. A lack of scientific evidence on the underlying reasons for travel policy violations exists. This is mainly due to the relative newness of the field of tourism as an academic discipline and business and corporate travel as sub-disciplines of this field. Organisations have had to mainly rely on industry-type surveys to seek answers to what causes traveller non-compliance. These answers have often been of a superficial nature with inadequate corporate guidelines and travel policy prescriptions presented as the main reasons for violations. The purpose of this paper is to look beyond these established reasons and identify underlying factors such as the effect of corporate culture on the behaviour of the corporate traveller as well as business and individual or personal ethics. Two broad categories of factors are identified and discussed from a theoretical perspective as a first step towards formulating a model against which violation of the corporate travel policy can be empirically tested within organisations: those related to the corporate travel policy as formulated and communicated by the organisation, referred to as corporate-related factors and including issues of corporate culture and business ethics; and those related to the person of the corporate traveller, referred to as personal-related factors and including issues of the personal ethics of the corporate traveller. The research methodology follows a two-stage approach, a qualitative phase and a quantitative phase. At this stage of the research the qualitative stage has been completed. This entailed confirming the identified constructs that underpin travel policy non-compliance. The Delphi technique was applied to senior management in corporate travel portfolios. From the literature survey and the results of the Delphi methodology a model was

conceptualised. The model includes those aspects that have not previously been considered: the effect of business ethics on policy compliance and the extent to which an individual's ethics and morals have an influence on policy compliance. It is the first scientific study of its kind in the context of business and corporate travel and relates to the values and norms in the public and private domains. The second stage of the study proposes the use of a structured questionnaire to corporate travellers in the private and public sectors to test the relationship between corporate- and personal-related factors and travel policy non-compliance as shown in the conceptual model.

Towards a model for corporate travel policy compliance

Ms Anneli Douglas

Prof Berendien Lubbe

University of Pretoria

South Africa

Abstract

Previous academic research has focussed on trends in the broader business travel market and very little research has been forthcoming on the management of corporate travel. A travel management programme allows an organisation to manage corporate travel expenditure, and through a well-formulated travel policy, to control its travel expenses. Traveller non-compliance of the travel policy is an increasing area of concern with (mainly industry) surveys conducted amongst travellers showing various reasons for non-compliance, both deliberate and unknowing. This paper goes beyond the reasons for non-compliance and seeks underlying factors not previously recognised. The overall purpose of the paper is to build and test a model of travel policy compliance based on these factors. Two broadly conceptualised factors that influence travel policy compliance are identified. The first can be termed corporate-related factors which relate to the corporate travel policy as formulated and communicated by the organisation and which include issues of corporate culture and business ethics. The second can be termed personal-related factors, which relate to the person of the corporate traveller and include issues of personal ethics. The study followed a two-stage approach: the first stage involved a qualitative methodology, the Delphi technique, to confirm the identified constructs that underpin travel policy non-compliance. From the literature survey and the results of the Delphi methodology a model was conceptualised that represents the factors and underlying constructs that influence travel policy non-compliance. The model proposes that travel policy compliance is a direct result of corporate-related factors and personal-related factors. Based on this model an instrument was developed to measure the policy compliance of corporate travellers. This forms the basis for the second stage of the empirical research. Corporate travellers from a number of organisations in the public and private sectors, who agreed to participate in the research, were requested to respond to the web-based questionnaire. Convenience sampling was used with

the aim to gather sufficient responses to overcome the limitations inherent in a convenience sample. The analysis of the data followed the path of first testing the data assumptions of the model, then testing the validity of the constructs and finally testing the travel compliance model using exploratory and confirmatory data analysis. The outcome of this study should produce a model which organisations can use to guide their travel management programme and against which they can evaluate their propensity for non-compliance. The results will provide insight into the factors that influence corporate travel policy compliance, both in the private and public sectors. It also measures aspects that have not as yet been considered as factors that may lead to non-compliance such as: the effect of business ethics on policy compliance and the extent to which an individual's ethics and morals have an influence on policy compliance. Finally it adds to the body of knowledge on business travel and in particular, corporate travel in so far as it is the first scientific study of its kind that tests both corporate and personal-related factors that could lead to non-compliance.



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APPENDIX B
- LIST OF PARTICIPANTS IN QUALITATIVE AND QUANTITATIVE
RESEARCH -

LIST OF EXPERTS PARTICIPATING IN QUALITATIVE RESEARCH

1. Kobus Meyer - Vodacom
2. Martin van der Merwe - PWC
3. Santie Visagie – Connex
4. Maria Martins – Carlson Wagonlit Travel
5. Sean Geyer - McKinsey
6. Ruby Naidoo – IBM
7. Duncan McCallum – Anglo American
8. Elaine van der Walt – First Rand
9. Mandy Diggle – Group 5
10. Carol Michel – Standard Bank
11. Jeannette de Kruijff – SABMiller
12. Anna Hattingh – Spescom
13. Jacqui Abrahams – Accenture
14. Felicity Meyer - ITMSA
15. Linda Basson – Accenture
16. Sally Rademaker – Ericsson
17. Talitha Redelinghuys – Sasol
18. Ray Lecolle-Brown – Unilever
19. Lynette Swart – PetroSA
20. Theresa Krynauw – PetroSA
21. Leon Kruger – ABSA
22. Abdul Khan – MTN
23. Sandra Hattingh – MTN
24. Mandy Gonsalves – Liberty
25. Karen Smith – Barloworld
26. Andrew Hillman – Pfizer
27. Brian Fredericks – Barloworld
28. Noreen Creswell – Carlson Wagonlit Travel
29. Denise Reyneck – Carlson Wagonlit Travel
30. Gaby Lindeque – Carlson Wagonlit Travel
31. Chane de Jongh – Carlson Wagonlit Travel



LIST OF ORGANISATIONS PARTICIPATING IN QUANTITATIVE RESEARCH

1. BP
2. VODACOM
3. SWISS RE
4. TRAVEL WITH FLAIR
5. UNIGLOBE
6. BMW
7. SASOL
8. DEPARTMENT OF WATER AFFAIRS
9. DEPARTMENT OF EDUCATION
10. SABS
11. TELKOM
12. CONNEX TRAVEL
13. PWC
14. COLUMBUS STEEL
15. DUBAI TOURISM
16. TRAINING COMPANY BASED IN PRETORIA



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APPENDIX C
- DELPHI PROCESS -

Please indicate with an “X” whether you agree or disagree with the following statements.

I believe that the following factors could influence travellers’ non-compliance with the company travel policy:

	AGREE	DISAGREE
Travel management is not a priority in the organisation		
Top management does not comply with the travel policy		
A lack of top management support for travel policy compliance		
Line management are unaware of the travel policy stipulations		
The department under which travel management falls for example finance, supply chain, procurement et cetera		
The corporate culture of the company for example a informal entrepreneurial culture vs. a more formal bureaucratic culture		
No dedicated full time travel manager		
The person responsible for the corporate travel function within the organisation does not have sufficient time to manage the travel function		
A lack of control of travel expenditure		
A poorly-formulated policy		
No or difficult access to the travel policy		
A lack of understanding of the travel policy		
Outdated travel policies		
A vague travel policy with possibilities of loopholes for non-compliance		
An online booking tool with inadequate features to monitor compliance		
An online booking tool that does not align with the travel policy		
A TMC that does not work according to the travel policy		
Inferior MIS reports		
Inadequate formal processes to measure compliance		
Out of policy travel are not managed prior to travel		
Inadequate pre-trip authorisation process		
Inadequate post-trip claim process		
Inadequate consequences for non-compliance		
Traveller ignorance on preferred suppliers for example: an airline’s perceived safety performance		



Frequent flyer miles accrue to the traveller for personal use		
Travellers break policy because cheaper options are available		
Traveller convenience comes before policy stipulations		
Travellers' perception of more reliable, safer and greater quality products vs. those stipulated in the travel policy		
Travellers prefer to use suppliers with whom they have had a personal experience		
Traveller's personal self esteem is more important than policy stipulations		
Old school vs. New school (older travellers are more likely to comply than younger travellers)		
Travellers feel that business travel is disrupting their lives and thus they should be allowed certain options that is not necessarily included in the travel policy		
Undisciplined travellers. If I miss my flight I will just take the later flight.		
Newer travellers are more compliant than frequent travellers		
A mentality of: "You can not tell me what to do"		
A mentality of: "What can I get away with?"		
An attitude of: "What is not stipulated is allowed"		
A non – compliance culture in the organisation		
A well documented travel requisition process will increase compliance		
Highlighting areas of non-compliance in the company newsletter will increase policy compliance		
Making an example of a non-compliant traveller will increase policy compliance		

Please add any other factors that were not mentioned above but that you feel might have an influence on policy compliance.



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APPENDIX D

- COPY OF IN-DEPTH INTERVIEW -

INTERVIEW WITH ALAN REID, PROCUREMENT MANAGER OF BP

Participants: AD – Anneli Douglas
BL – Professor Berendien Lubbe (Supervisor)
AR – Alan Reid

An introduction of the interviewers and a brief indication of the purpose of the project initiated the interview. Permission were asked to take notes and audiotape the conversation, and the respondent was thanked for his willingness to make a contribution to the research project.

AD: Do you experience problems in compliance with the corporate travel policy?

AR: We've probably got about 10 percent non-compliance. And we know who they are, and occasionally we bust them. But the way our travel policy is applied at the moment is that we cut out options so that travellers do not really have too many choices.

BL: Why do you think they (corporate travellers) do not adhere? Is it more personal related rather than corporate related, that the policy isn't clear, or...?

AR: Oh, the policy is very clear, I think the primary reason is let's call it self interest – Travellers are saying: I Don't want to fly on BA because I believe SAA's Voyager is a better programme. Or I don't want to bounce between airlines because I am not going to be able to accumulate my voyager miles for points so that I can be a silver or gold card holder, cause I want to go into the lounge because that is what some people believe shows the importance of people. Then you have some people saying that they don't want to stay in a certain hotel because they prefer another hotel for a number of reasons and a lot of it has to do because they want to say "I stayed in the Westcliff", or the Sheraton". They don't want to say I stayed in the City Lodge or drive Chico Golf because how does that look in front of my peers or colleagues? If you work for a big company you are perceived to be important. Then we get a few non-compliance issues around airlines, I do not know of another corporate

who runs a corporate credit card system to the extent that we do. Every single traveller, or no not every traveller, let's say 80 % - 90 % of travellers have their own corporate credit card, for all travel and entertainment expenses. So when I book with Carlson Wagonlit, anything related to my trip goes to my AMEX, it all comes to me, I have to capture it in our system and then my AMEX card gets paid. Now if I don't do that my AMEX card does not get paid, my AMEX card gets suspended and I can't travel. So that puts a very tight reign on payments.

BL: Is the policy structured on the level of management, where certain levels of travellers are not allowed to do something you know...

AR: Everybody is allowed the same treatment. Policy is structured around the trip. If the chairman or the chief executive wants to fly business class we're not going to say they can't, but they won't. Top management comply with policy and because they are gold cardholders they get upgraded automatically in anyway.

BL: Do you have an online booking system that goes to the travel agency or do you have an in-house travel agency?

AR: Yes we have an in-house in Cape Town, but that is a legacy that we are trying to get rid of and then we have the TMC just around the corner.

BA: So the secretaries and PA's generally make the bookings?

AR: Most individuals book their own travel, some people will phone and say I need to go to CT on this date so find me a hotel. They make the booking and send the email through, confirming the booking.

BL: In that process is there a process of approval at the time of booking?

AR: No, the TMC will send me back a note saying Alan you are flying on this date and staying at that hotel and you are flying back on tat date. They then require

me to confirm the acceptance of that by a paper approval process –the direct manager must approve the booking with his signature. The problem is that this might take up to 5 days to get signature for travel. Only when they have received the form with the manager’s signature on, will they confirm the booking.

BL: It seems to me that the whole process of approval is very much a matter of integrity and trusting the integrity of the traveller and supervisor?

AR: Yes, but if the manager sees that a line item wasn’t approved, the traveller will not be reimbursed. If there is a health and safety emergency and the guys have to get on a plane immediately now in those cases the entire process will fall apart, because nothing is more important than health and safety. It does rely on integrity but there are some checks and balances in place. Five percent of travellers are going to buck the system in any case so why create a laborious process for 95 % of the travellers that comply.

BL: Do you think unnecessary travel occurs, in other words that people travel to get away from home?

AR: I think possibly you might get a new kid on the block who might try to manufacture a trip but because of the approval system that doesn’t really happen.

AD: How do you communicate the travel policy to your travellers?

AR: Just on the Internet and we educate small forums of people. If you have a manual policy no one reads it.

BA: Do you have a feedback system in any format where travellers can say if anything worries them about travel or anything that they would like to change or that they feel are uncomfortable about travel?

AR: The biggest complaint is getting people to travel in non-business hours. It is an Old school vs. new school scenario. Older travellers are more likely to comply. That is the big issue. I don't want to stay in a cheap hotel, because travelling is disrupting my life. Our problem is that we have too much money. Travellers are saying why do I need to save my company money if they are making so much money and have such an enormous travel budget. The other issue is that our travellers are all members of incentive programmes.

BL: Do the miles accrue to them personally?

AR: Yes and this is a reason for non-compliance. BUT we don't give them a choice anymore. We used to give them a choice if the difference was less than 500 bucks on a ticket but now, the cheapest most direct route gets preference.

BA: What is your policy on low cost airlines?

AR: Students and contractors fly with the low cost airlines. Ignorance leads to non-compliance. I don't want to fly Kulula because they are a low cost airline and unsafe. We do not fly Mango and OneTime because they do not allow changes to bookings. Our travellers are very undisciplined. If they miss the flight they will just take a later flight.

BL: Do you see a difference in the different age groups; that the older guys are more disciplined than the younger guys?

AR: Yes, definitely.

AD: Do you think that there is a difference between frequent and less frequent travellers. So that the frequent travellers are less compliant than the less frequent travellers?

AR: Yes, because frequent travellers know how to buck the system.

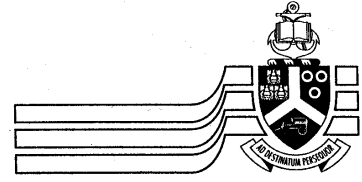


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BL: Thank you Alan, you have given us a lot of valuable information, we appreciate your time.

APPENDIX E

- CORRESPONDENCE WITH ORGANISATIONS -



University of Pretoria

Dear Colleague

Based on the results of the successful corporate travel management survey conducted in South Africa in 2002, and repeated in 2004, the Department of Tourism Management at the University of Pretoria developed a model to manage corporate travel more effectively. The University is now expanding on this research by testing one very important component of this model, namely travel policy compliance. We are proud to say that South Africa is a leader in this particular research field.

We need your expert opinion on what influences travel policy compliance. This will ensure that the questionnaire to be distributed to corporate travellers throughout South Africa adequately covers all factors that may influence compliance.

Your contribution is required for two rounds. In the first round we would like you to give your opinion on all the factors that you feel may influence compliance. This should take approximately **20 minutes** to complete. We then consolidate the opinions of all the respondents and return this to you for a second round. **Your individual response remains confidential.** In this round you may agree or disagree with your colleagues. This should take no longer than **10 minutes** to complete.

In asking you to respond with your views I realise that 30 minutes of your time is no small request in your busy day. However, your response will ensure that the survey achieves its main aim of improving corporate travel policy compliance in companies. We would like to urge you to please respond to this email before **28 September 2007**. We can assure you that you will benefit from the results of this survey, as **all respondents will receive a complementary executive summary of the final report.**

Through a comprehensive review of the literature and current research on travel policy compliance globally, we have determined that factors ranging from personal morality to corporate culture and travel policy restrictions influence compliance. However, we need to ensure that we take your views into consideration. Please provide **your opinion** of all the factors that you see as having an influence on compliance **as comprehensively as possible.** You may list the factors or describe them in sentence form. Please do this as a reply to this email or forward to the following address: anneli.douglas@up.ac.za.

For further clarity and information, we attach a document explaining the research process.

Please feel free to contact me with any queries or problems.

We thank you for your kind co-operation.

Prof Berendien Lubbe
Professor



Department of Tourism Management,
University of Pretoria
South Africa
Tel: 27 12 420-4102
Fax: 27 12 420-3349
Cell: 0824521743

Dear

I would like to thank you for your cooperation thus far in this important study. We have reached the stage where the questionnaire must be distributed to your corporate travellers (unfortunately later than what we originally envisaged). As discussed, the questionnaire is in a web format and will only take your travellers approximately 10 minutes to complete. I would like to urge you to motivate all your travellers to complete the questionnaire, as the more travellers that respond, the better the final results will be and the greater the benefit that you will gain from the study.

I realise that this is a very difficult time of the year and that most of your travellers might already be on leave but would like to distribute the questionnaire none the less, believing that we will get some responses. The questionnaire will remain open on the University of Pretoria website until the 31st of January, to allow enough time for responses. I will send out an email in the middle of January again, reminding and encouraging the travellers to complete the questionnaire.

I would like to suggest that you distribute the link to the questionnaire via an email to all your travellers. The questionnaire is hosted on the University of Pretoria website and therefore the traveller and the company from which respondents reply remains anonymous.

For your convenience, I have compiled a letter that may serve the purpose of a cover letter for distributing the questionnaire to your travellers. However, this is merely a suggestion. The letter reads:

"Dear Corporate Traveller

The University of Pretoria, together with a number of companies is conducting research into the travel needs of corporate travellers. We at BP have decided to participate in this very important study and would like to request you, as a corporate traveller, to respond to the questionnaire hosted on the University of Pretoria website (<http://online.up.ac.za/surveys/fillsurvey.php?sid=2>)

Please be assured that neither you nor our company can be identified, giving you the opportunity to voice your honest opinion. We would like to urge you to complete the questionnaire which should not take more than 10 minutes. The deadline for responses is 31 January 2008. For the study to achieve its purpose, your participation is essential.

If you agree to take part in the study please click on the link provided below.
<http://online.up.ac.za/surveys/fillsurvey.php?sid=2>

The link will take you to the questionnaire which is hosted on the University of Pretoria website. When you have completed the questionnaire, click the submit button at the end of the questionnaire.

Thank you for your time and participation in this study"

Thank you once again for your cooperation and support, it is much appreciated.

*Kind Regards
Anneli Douglas*

*Department of Tourism Management,
University of Pretoria
South Africa
Tel: 27 12 420-4073
Fax: 27 12 420-3349
Cell: 082 497 4870
Dear*

We have received a number of responses to our Corporate Travel Policy Compliance Questionnaire and we greatly appreciate your travellers' cooperation. Your travellers' responses will ensure that the survey achieves its main aim of improving the travel policy compliance rate in your company. We would like to request you to urge those travellers who have not yet responded to please do so before the end of January. As discussed, the questionnaire is in a web format and will only take your travellers approximately 10 minutes to complete. The questionnaire is hosted on the University of Pretoria website and therefore the traveller and the company from which respondents reply remains anonymous. We can assure you that you will benefit from the results of this survey.

For your convenience, I have compiled a note that may serve the purpose of a reminder to your travellers. However, this is merely a suggestion. The note reads:

"Dear Corporate Traveller

The University of Pretoria, together with a number of companies is conducting research into the travel needs of corporate travellers. We at Swiss Re have decided to participate in this very important study and would like to request you, as a corporate traveller, to respond to the questionnaire hosted on the University of Pretoria website (<http://online.up.ac.za/surveys/fillsurvey.php?sid=2>), if you have not done so already.

Please be assured that neither you nor our company can be identified, giving you the opportunity to voice your honest opinion. We would like to urge you to complete the questionnaire which should not take more than 10 minutes. The deadline for responses is 31 January 2008. For the study to achieve its purpose, your participation is essential.

If you agree to take part in the study please click on the link provided below.
<http://online.up.ac.za/surveys/fillsurvey.php?sid=2>

The link will take you to the questionnaire which is hosted on the University of Pretoria website. When you have completed the questionnaire, click the submit button at the end of the questionnaire.

Thank you for your time and participation in this study."

If you have distributed the questionnaire together with the reminder to your travellers, would you please be so kind as to confirm your participation with an email to this address, so that we could send you a copy of the executive summary.

Thank you once again for your kind cooperation.

Kind Regards

Anneli Douglas

Department of Tourism Management,
University of Pretoria
South Africa
Tel: 27 12 420-4073
Fax: 27 12 420-3349
Cell: 082 497 4870

Dear

We have received 102 responses to our Corporate Travel Policy Compliance Questionnaire and we greatly appreciate your travellers' cooperation. Unfortunately we need a minimum of 200 questionnaires in order to draw reliable statistical inferences from the data. Therefore, we desperately need more responses so that the survey achieves its main aim of improving the travel policy compliance rate in your company.

Please would you be so kind as to send a final reminder to your travellers, urging them to respond to the questionnaire as soon as possible. To acquire more responses the website will now remain open until the 15 February 2008.

For your convenience, I have compiled a note that may serve the purpose of a final reminder to your travellers. However, this is merely a suggestion. The note reads:

"Dear Corporate Traveller

This is your final chance to have your say and voice your honest opinion!

The University of Pretoria has decided to extend the deadline for their survey on the needs of corporate travellers. This will allow you more time to give your valuable input by completing the survey. Please take 10 minutes to respond to the survey hosted on the University of Pretoria website (<http://online.up.ac.za/surveys/fillsurvey.php?sid=2>), if you have not done so already.

Be assured once again that neither you nor our company can be identified, giving you the opportunity to voice your honest opinion. The deadline for responses is now the 15 February 2008. For the study to achieve its purpose, your participation is essential.

If you agree to take part in the study please click on the link provided below.
<http://online.up.ac.za/surveys/fillsurvey.php?sid=2>

The link will take you to the questionnaire which is hosted on the University of Pretoria website. When you have completed the questionnaire, click the submit button at the end of the questionnaire.

Thank you for your time and participation in this study."



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We have also contacted a number of other companies to participate in the research so hopefully this last effort will render sufficient responses!

Thank you once again for your kind cooperation.

Kind Regards

Anneli Douglas
Department of Tourism Management,
University of Pretoria
South Africa
Tel: 27 12 420-4073
Fax: 27 12 420-3349
082 497 4870

APPENDIX F

- CORPORATE TRAVELLER QUESTIONNAIRE -

Introductory letter and consent form for participation in a research study

University of Pretoria

The Department of Tourism Management, Faculty of Economic and Management Sciences, University of Pretoria.

RESEARCH ON FACTORS THAT MIGHT INFLUENCE A CORPORATE TRAVELLER'S COMPLIANCE WITH THE CORPORATE TRAVEL POLICY

Description of the research

You are invited to participate in a research study conducted by Anneli Douglas under the direction of Prof. Berendien Lubbe of the Department of Tourism Management, Faculty of Economic and Management Sciences, University of Pretoria.

The purpose of the study is to investigate the factors that might influence a corporate traveller's compliance with the corporate travel policy.

Protection of confidentiality and voluntary participation

We wish to assure you that all information we receive will remain confidential and that your participation will remain anonymous. Your contribution to this study is extremely important to ensure the success of the project. Your participation in this research study is, however, voluntary. You may choose not to participate and you may withdraw your consent to participate at any time. You will not be penalized in any way should you decide to withdraw from this study.

Your participation

The questionnaire has been structured in such a way that it facilitates quick and easy completion and it should only take you 10 minutes to complete. Your task is to answer the questions as accurately and truthfully as possible. There are no correct answers.

Potential benefits

Once the data has been analyzed, summary findings will be presented to participating companies, with recommendations on how to respond to the results. In this way, your contribution to the research should benefit you and your company in future. The value and outcome of the research depends on your willingness to take part in this project.

Contact information

If you have any questions or concerns regarding this study or if you encounter any problems, please contact:

- * Professor Berendien Lubbe at 012- 420 4102; e-mail berendien.lubbe@up.ac.za.
- * A. Douglas: (w) 012- 420 4073, cell: 0824974870, fax: 012-4203349 or e-mail: anneli.douglas@up.ac.za.

Yours faithfully
Miss A. Douglas
Researcher

I have read the consent form and have been given the opportunity to ask questions. I am prepared to willingly participate in this study (Please tick in the shaded box).

Yes	<input type="checkbox"/>
-----	--------------------------

Dear respondent

Please answer all the questions. There are no right or wrong answers. Your data will automatically be submitted to a spreadsheet, where any method of personal identification is impossible. Therefore, we guarantee you full confidentiality and anonymity.

1. Approximately how many business trips have you made domestically / internationally (including Africa) on behalf of your organisation **during the past 12 months?**

Domestic	_____ Times
International (including Africa)	_____ Times

2. In total, approximately how many days in a year are you away from home on business trips?

_____ Days

3. On average, how long (number of days) is your typical business trip?

Domestic	_____ Days
International (including Africa)	_____ Days

4. Who is **MAINLY** (Choose only **ONE** option) responsible for making your travel reservations when you travel for business purposes?

Myself	<input type="checkbox"/>
My secretary/personal assistant	<input type="checkbox"/>
A specifically allocated person in each office	<input type="checkbox"/>
A central travel department for the whole organisation	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

5. Is the travel management function in your organisation part of:

A corporate travel department	<input type="checkbox"/>
The procurement/purchasing function	<input type="checkbox"/>
The financial function	<input type="checkbox"/>
No travel management function	<input type="checkbox"/>
I do not know	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

6. Does your organisation have a(n):

Corporate self-booking tool	<input type="checkbox"/>
In-house travel agent	<input type="checkbox"/>
Outside travel agent / s	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

7. Are **your** business travel arrangements made **MAINLY** through:

The organisation's own corporate-self booking tool	<input type="checkbox"/>
An in-house travel agent	<input type="checkbox"/>
An outside travel agent/s	<input type="checkbox"/>
Directly on the internet (Any other supplier or agent)	<input type="checkbox"/>



8. What type of travel policy do you think your organisation has?

High control (Prescriptive and mandatory)	
Medium control	
Low control (Informal guidelines, to be followed when possible)	
I do not know	

9. What is the **MAIN** form of communication of the travel policy to employees?

Online accessibility	
Regular memorandums	
Single written document	
Word of mouth	
No communication	
I do not know	

10. How well do you generally understand the travel policy of your organisation?

Very well	
More or less	
Not at all	

11. How do you think your organisation should distribute the loyalty card points you have earned for business travel?

For the traveller's personal use	
For travel on behalf of the organisation	
The organisation can use it as they like	
A split between organisation use and personal use	

12. Overall, how would you rate your organisation's travel policy?

Fair	
More fair than unfair	
Neutral	
More unfair than fair	
Unfair	

13. Do you experience problems in general in complying with the travel policy?

All of the time	
Most of the time	
Some of the time	
Rarely	
Never	



14. I find it difficult to comply with the travel policy in the area of

	Never	Rarely	Some of the time	Most of the time	All of the time	No policy guidelines
Class of air travel						
Choice of airline						
Choice of accommodation establishment						
Choice of car rental company						
Type of car						
Meals and entertainment						
Travel approval procedures						
Other (Please specify)						

15. Indicate your opinion on how the possible reasons for non-compliance may apply to you.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
Last-minute airline bookings, because of inflexible business schedules.							
Last-minute accommodation bookings, because of inflexible business schedules.							
Policy does not seem to meet my travel needs.							
I prefer to use airlines where I am a loyalty card holder.							
Lack of communication on correct travel procedures.							
Policy not easily understood.							
Policy is vague.							
I have unknowingly infringed the travel policy (for example, not using the preferred supplier).							
I sometimes break the rules of the corporate travel policy to save my organisation money.							
Policy not easily accessible.							
I cannot always comply with the travel policy when my trip details change while I am on the trip.							
The airline stipulated in the travel policy does not always have seats available.							
The accommodation establishment stipulated in the travel policy does not always have rooms available.							
Because management does not comply with the travel policy, I feel I do not always want to comply with the travel policy.							
Unfair travel policy. All travellers are not allowed the same treatment.							
Other, please specify							



16. What is your approximate percentage (%) of **COMPLIANCE** with the travel policy? (A percentage between 0 % = never comply to 100 % = always comply)

%

17. Indicate the extent to which you agree with the following statement.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
I believe travellers in my organisation are generally policy compliant.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. I would describe my organisation as:

Entrepreneurial (Informal and employee oriented)	<input type="checkbox"/>
Neither entrepreneurial nor bureaucratic	<input type="checkbox"/>
Bureaucratic (Formal and organisation oriented)	<input type="checkbox"/>

At this stage of the questionnaire it is important to remind you that your responses will remain strictly confidential. There is no way that you could be identified by your responses. This is your chance to be honest and have your say!

19. Please indicate the extent to which you agree with the following statements.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
Managers in my organisation often engage in behaviours that I consider as being unethical .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In order to succeed in my organisation, it is often necessary to compromise one's ethics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Top management in my organisation has let it be known in no uncertain terms that unethical behaviours will not be tolerated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If a manager in my organisation is discovered to have engaged in unethical behaviour that results primarily in personal gain (rather than corporate gain), he or she will be promptly reprimanded.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If a manager in my organisation is discovered to have engaged in unethical behaviour that results primarily in corporate gain (rather than personal gain), he or she will be promptly reprimanded.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



20. Please indicate the extent to which you agree with the following statements.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
I sometimes break the rules of the corporate travel policy because I believe that my organisation owes me extra compensation for the time and hassle involved with business travel.							
I sometimes break the rules of the corporate travel policy because I have been treated inequitably by my organisation.							
Because management does not comply with the travel policy, I feel I also do not need to comply with the travel policy.							
The travel policy is unfair. All travellers are not allowed the same treatment.							
I sometimes feel that my organisation is insensitive to my safety needs when I travel for business purposes.							
Cost saving seems more important than traveller convenience.							
Corporate agreements with specific suppliers appear to be more important than personal loyalty cards.							

21. Please indicate the extent to which you agree with the following statements.

	Never	Rarely	Some of the time	Most of the time	All of the time
I have to complete a comprehensive travel requisition form when I travel for business purposes.					
I have to get pre-trip approval before undertaking any business trip.					
When returning from a business trip I have to submit details of my trip for post-trip reviews.					
I tend to travel out of policy (not according to policy stipulations) because there is very little control of the travel process.					
My travel agent informs me when I make a booking that is out of policy.					
My travel agent will not make a booking when it is out of policy.					



22. Please indicate the extent to which you agree with the following statements.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
In my job I sometimes compromise my beliefs to do my job the way the organisation wants me to do it.							
Sometimes I report only part of the truth to my boss.							
Sometimes I have to alter things (documents, time cards etc) in order to please my organisation.							
Sometimes I have to break organisation policy to do what is necessary.							
Sometimes I say one thing even though I know I must do something else.							
Sometimes I claim to have done something I have not.							

23. Please indicate the extent to which you agree with the following statements.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
In order to present a degree of status to business colleagues, it is important to fly business class, even if it is out of policy.							
I sometimes break the rules of the corporate travel policy because it benefits me to do so.							
I will disregard organisation travel policies to stay in the hotels I prefer.							
I will disregard organisation travel policies to fly with the airlines I prefer.							
I will disregard organisation travel policies to hire the vehicle I prefer.							



24. Rate your level of satisfaction with the service providers as prescribed in your travel policy.

	Dissatisfied	Not that satisfied	Neutral	Satisfied	Very satisfied
Accommodation providers					
Airlines					
Car rental companies					

25. Please indicate the importance, to you **personally**, of each of the following factors when **travelling longer distances by air** on behalf of your organisation.

	Unimportant	Not that important	Neutral	Important	Very important
Comfort of airline seat					
Price of airfare					
In-flight entertainment and meals					
Overall service					
On time performance					
Lounge facilities					
Safety					
Loyalty programmes					
Own choice of airline					

26. Please indicate how important the following factors are to you **personally** with regard to **accommodation establishments** when travelling on behalf of your organisation.

	Unimportant	Not that important	Neutral	Important	Very important
Price					
Service					
Location					
Safety					
Facilities					
Comfort					
Aesthetic appeal					
Loyalty Programmes					
Own choice of accommodation establishment					



27. To what extent do you agree with the following statements with regard to your **level of satisfaction with your job?**

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
I am satisfied with my promotion opportunities.							
I am satisfied with the recognition I receive for a job well done.							
I am satisfied with the amount of pay I have in how my work is done.							
I am satisfied with my job security.							

28. **In terms of my life in general** I would describe myself as:

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
Satisfied							
In control of my life							
An extrovert							
Optimistic							
Someone with a high self-esteem							

29. Indicate the extent to which you agree with the following statements.

	Strongly disagree	Disagree	Somewhat disagree	Neutral	Somewhat agree	Agree	Strongly agree
I do not like it when someone tells me what to do.							
I like to see how far I can push the boundaries.							
I believe what is not stipulated is allowed.							
I do not believe I harm my organisation when I miss my flight and simply take a later flight.							
In my organisation there are clearly defined consequences to various levels of non-compliance (for example an employee who repeatedly infringes the policy deliberately will be dismissed).							
In the past, my company has made an example of a non-compliant traveller.							



30. Is your organisation in the

Private sector	
Government sector	
Other (Please specify)	

31. Do you reside in:

South Africa	
Europe	
Other, please specify	

32. What is your position in the company?

Top Management	
Middle Management	
Junior Management / Supervisor	
Employee (Other)	

33. What is your marital status? *Our aim with the question is to determine whether there is a significant difference in the travelling needs of corporate travellers who are in different stages of the lifecycle.*

Single	
Married/Cohabiting with no children	
Married/Cohabiting with children	
Divorced	
Widowed	

34. What is your gender?

Male	
Female	

35. How many years have you been an employee of the company? *This question is asked to determine whether the needs of employees differ according to the number of years they have been employed at the company.*

_____ Years

36. What is your age?

_____ Years

**Thank you for completing the survey.
 We appreciate your assistance.**