GBTA Global Business Travel Association

Many Voices. One Purpose.

The Dawn of the Employee-Centric Travel Program?

October 2022

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Introduction

Modern travel programs are complex. Travel programs track a growing number of metrics and key performance indicators and use new technology to achieve goals. However, one element remains largely unchanged. At the heart of any successful travel program are business travelers themselves. A successful travel program enables—indeed empowers — employees to achieve critical business outcomes while ensuring safety and limiting cost. While many travel programs prioritize cost savings and policy compliance, they can only achieve these goals if employees understand and buy into them. To earn employee compliance and enable business outcomes, travel programs can offer high-quality service, streamlined processes, and a user-friendly experience.

This study examines the role of the **employee experience** in managed corporate travel. It is based on (1) a survey of U.S.-based business travelers and (2) a survey of U.S. corporate travel managers. It addresses a number of key questions including:

- **Travel program priorities:** Is traveler experience more important than other objectives such as cost savings? To what extent will companies prioritize traveler experience in the coming years? Do business travelers feel their company balances cost savings with employee satisfaction?

- **Traveler perks:** What perks do business travelers want to improve their experience while traveling? Do travel programs offer these perks – or would they consider doing so?

- **Travel program metrics and KPIs:** How do companies measure traveler satisfaction? How often do they conduct traveler surveys? Do they have key performance indicators (KPIs) for the overall program, their TMC, and their travel technology?

- **Accessibility:** Do travel programs adequately accommodate employees with disabilities and special needs? How do they book trips for these employees?

Study based on two separate surveys:

U.S. travel manager survey:

- Data collection from June 28 – July 11, 2022

- An email invitation was sent to 3,234 travel managers including current and former members of GBTA

- In total, 159 Travel Managers completed at least one question, for a response rate of 4.9%. Of these, 141 qualified because they are based in the United States and are "involved in managing or procuring travel on behalf of [their] company."

- Of those who responded, 114 completed the entire survey

Study based on two separate surveys:

U.S. business traveler survey:

- Data collection from June 30 – July 7, 2022

- Respondents qualified if:

  - They are based in the U.S.

  - They are employed full-time or part-time

  - They work for a company with more than 1,000 employees

  - They have taken at least 3 business trips where they traveled at least 50 miles from their home in 2021 and 2022

- At least one of 4 conditions apply:

  - Their company "has a corporate travel manager, travel team, or other staff (e.g., finance or HR) that oversees travel-related processes"

  - Their company "provides a corporate travel agency [they] can use to book trips or request assistance"

  - Their company "provides a corporate booking tool (e.g., Deem Etta or SAP Concur Travel) that [they] can use to book trips

  - Their company "has a corporate travel policy that outlines travel-related rules and processes"

- In total, 406 business travelers completed the survey
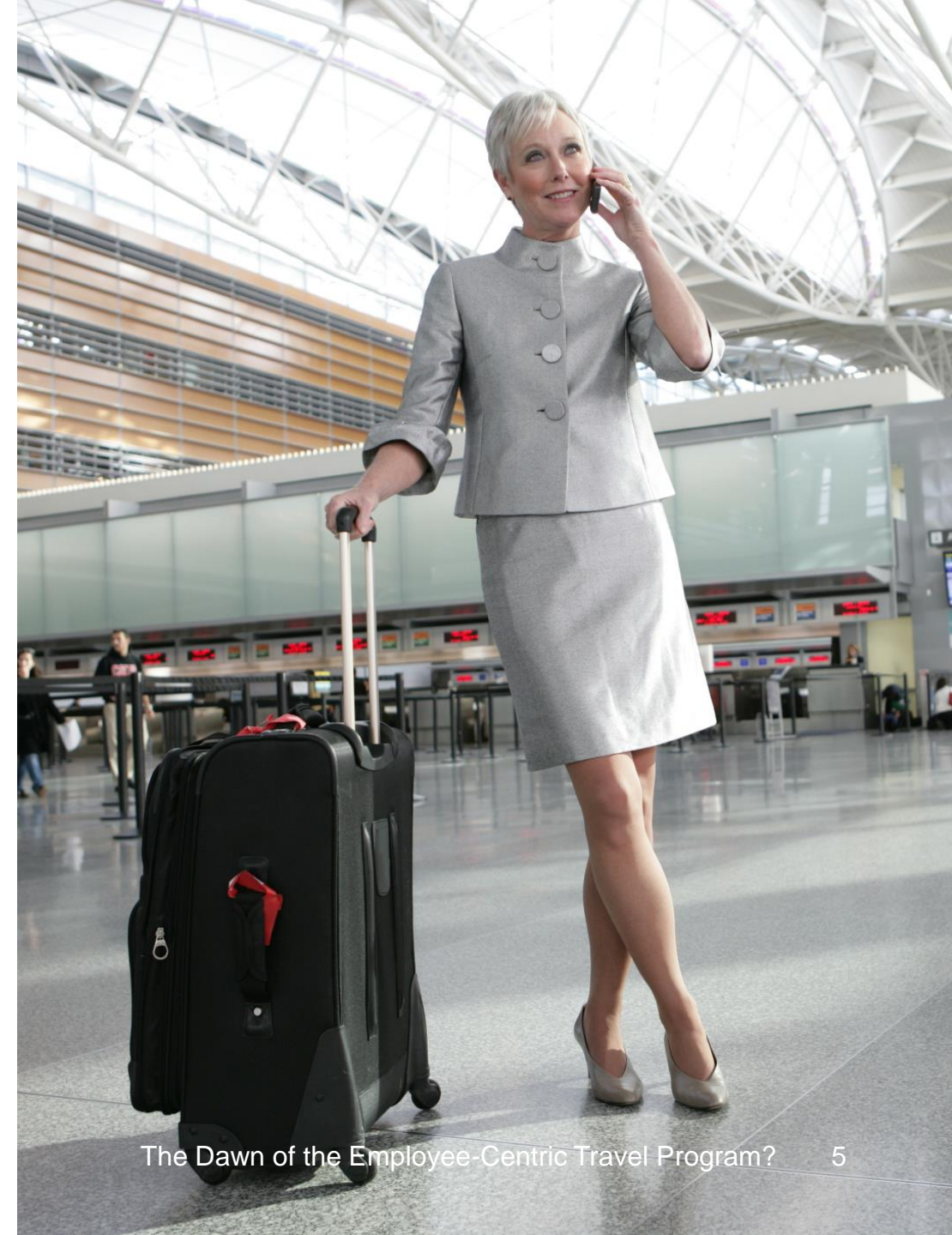
Key Highlights

- **Employee satisfaction is more often viewed as a pain point of travel programs than a strength.** Only 13% of travel managers say traveler experience/satisfaction is the single greatest strength of their program. More than one-quarter (28%) say traveler experience/satisfaction is the single greatest pain point. This is higher than the percentage for any other pain point tested.

- **Some business travelers feel their company's travel program prioritizes cost savings over employee satisfaction**. Two in five business travelers (41%) say their company's travel program prioritizes cost savings over employee satisfaction. A similar number (38%) say the program balances cost savings and employee satisfaction equally. One in five (21%) say their company's travel program prioritizes employee satisfaction over cost savings.

- **A large majority of business travelers hope to return to their pre-pandemic business travel frequency.** Four in five (81%) would prefer to travel for work the same amount as they did pre-pandemic (46%) or more often than they did pre-pandemic (35%).

- **Two in five business travelers (38%) say their company's travel technology is the single core element they are least satisfied with.** This is higher than the share who indicate their company's corporate travel agency (33%) or their company's corporate travel manager/team (20%).

28% of travel managers say traveler experience/ satisfaction is the single greatest pain point of their program

Key Highlights

- **Business travelers are interested in various perks that can improve the traveler experience.** They were presented with seven perks and asked to pick up to three that they want their company to offer the most to improve the traveler experience. The most commonly indicated perks include:

  - **Freedom to choose suppliers:** Almost half of business travelers (46%) say freedom to book with their favorite suppliers (i.e., those with which they have loyalty status) is one of the top three perks they want their company to offer. Almost one-quarter of travel managers (23%) say their company already offers this and an additional 3% definitely would consider offering it.

  - **Staying an additional night:** A decent number of business travelers (43%) say being allowed to stay an additional night after their work meeting ends is one of the perks they want their company to offer the most. Almost one-third of travel managers (31%) say their company already offers this and an additional 13% definitely would consider offering it.

  - **Additional time off:** One-third of business travelers (34%) say additional time off for frequent travel is one of the top three perks they want their company to offer the most. Fourteen percent of travel managers say their company currently offers this and an additional 7% say their company definitely would consider offering it.

  - **Separate policies for road warriors:** One-quarter of business travelers (27%) say their company having separate policies for frequent travelers that are different from the policies it has for all other employees is one of the three perks they want their company to offer the most. One in 10 travel managers (11%) say their company already offers this and an additional eight percent definitely would consider offering it.

11% of U.S. travel programs have **special policies for frequent travelers** that are different from the policies it has for other employees

Key Highlights

- **For most business travelers, reducing their carbon footprint is a moderate priority when they travel for work.** Almost four in five business travelers (77%) say reducing their carbon footprint is a moderate priority or their top priority when they travel for business. However, they are more likely to say it is a moderate priority (56%) than their top priority (21%)

- **Business travelers are willing to sacrifice in order to reduce carbon emissions.** Most are willing to opt out of daily room cleanings (77%), rent smaller cars (73%), fly premium class less often (68%), take fewer business trips (63%) and even travel for longer periods of time to reduce emissions (56%).

- **While most travel programs conduct employee surveys, a decent number still do not.** Some travel managers say their company does not survey employees about their satisfaction with the overall travel program (44%), satisfaction with their TMC (40%), or satisfaction with travel program technology (36%).

- **Most travel programs do not have clearly defined processes or resources for employees with accessibility needs.** Only one-third of travel managers (32%) say their company has clearly defined processes or resources for accessible travel. This includes one in five (20%) who say they have clearly defined processes and resources that are largely effective and one in 10 (12%) who have processes or resources that need some improvement. However, this does not necessarily mean that travel programs neglect these employees. Half of travel managers (50%) say their company does not have clearly defined processes or resources - but does a good job handling these requests on an ad-hoc basis.

Only 32%
of travel managers say their company Sony has clearly defined processes or resources for accessible business travel

Key Highlights

- **Many travel managers feel their corporate booking tool does not adequately serve employees with accessibility needs.** Only one-quarter (26%) say their company's corporate booking tool does a great job or a pretty good job accommodating travelers with accessibility needs. A larger number (37%) say it does a poor job or a so-so job accommodating these travelers.

- **Travel managers give their company's corporate online booking tool (OBT) mixed ratings when it comes to user experience.** Only 20% say user experience is a strength of their company's primary OBT. One-third (32%) say the user experience is "so-so" or a "pain point."

- **Business travelers are interested in various booking-related innovations.** These include personalized shopping results based on factors such as purchases they have made in the past or suppliers where they have loyalty status (78%), ability to book multiple types of ground transportation such as rental cars and rideshare (78%), and integration with a risk intelligence platform that can display information such as COVID-19 infections and local crime statistics (70%).

32% of travel managers say the user experience of their company's primary corporate booking tool is "so-so" or a "pain point"

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Travel Program Priorities – Where Does Traveler Experience Fit?

Only 13% of travel managers say traveler experience / satisfaction is their program's single greatest strength
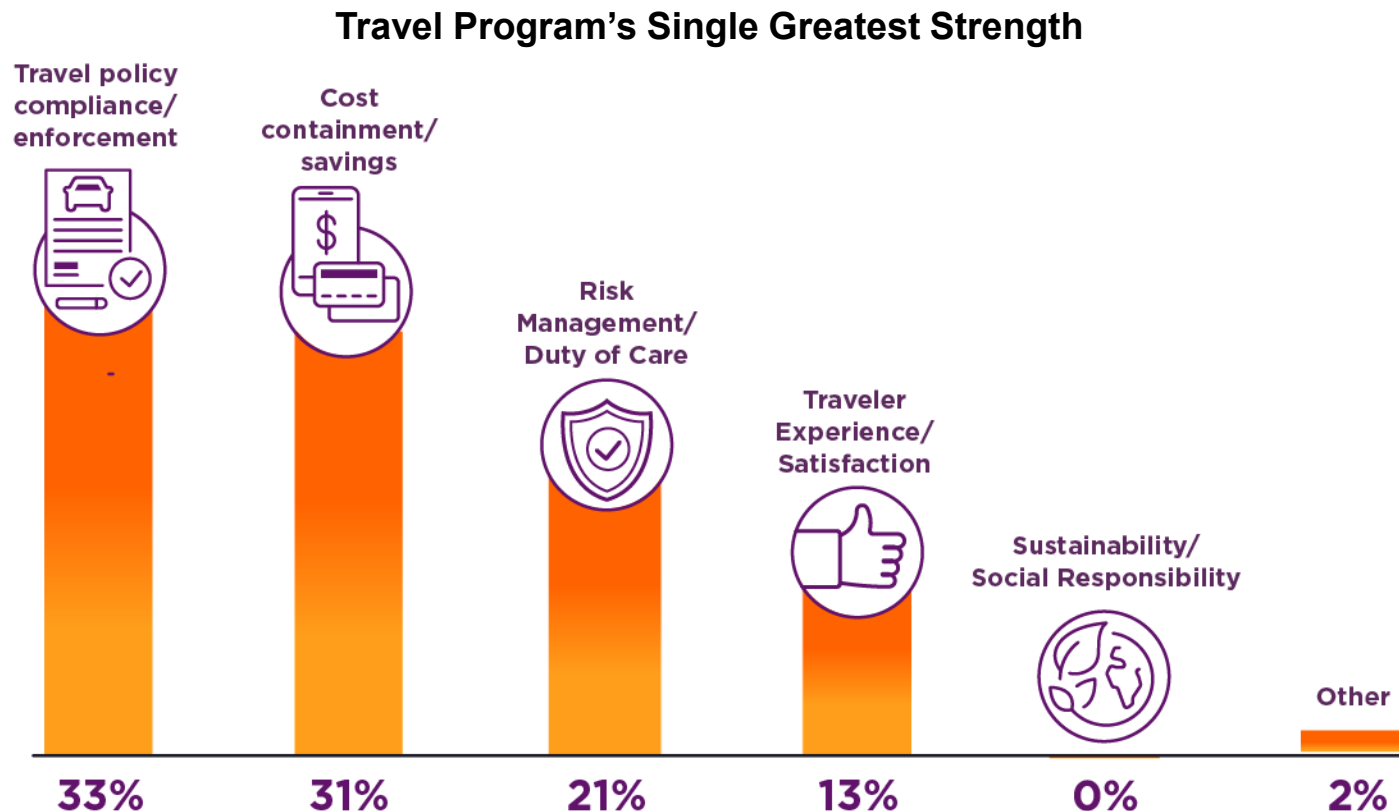
Travel Program's Single Greatest Strength

Travel policy compliance/ enforcement	Cost containment/ savings	Risk Management/ Duty of Care	Traveler Experience/ Satisfaction	Sustainability/ Social Responsibility	Other
33%	31%	21%	13%	0%	2%

Q. Thinking about your company's travel program overall, which of the following areas do you think is the greatest strength today? (n=132)

Traveler experience is rarely viewed as the top travel program strength. Travel managers were asked to identify the single greatest strength of their program. Two-thirds (64%) say either travel policy compliance (33%) or cost containment/savings (31%) is their program's greatest strength . Only 13% say traveler experience/satisfaction is their program's greatest strength.

More than one-quarter of travel managers say traveler experience/satisfaction is their program's top pain point

Travel Program's Single Greatest Pain Point
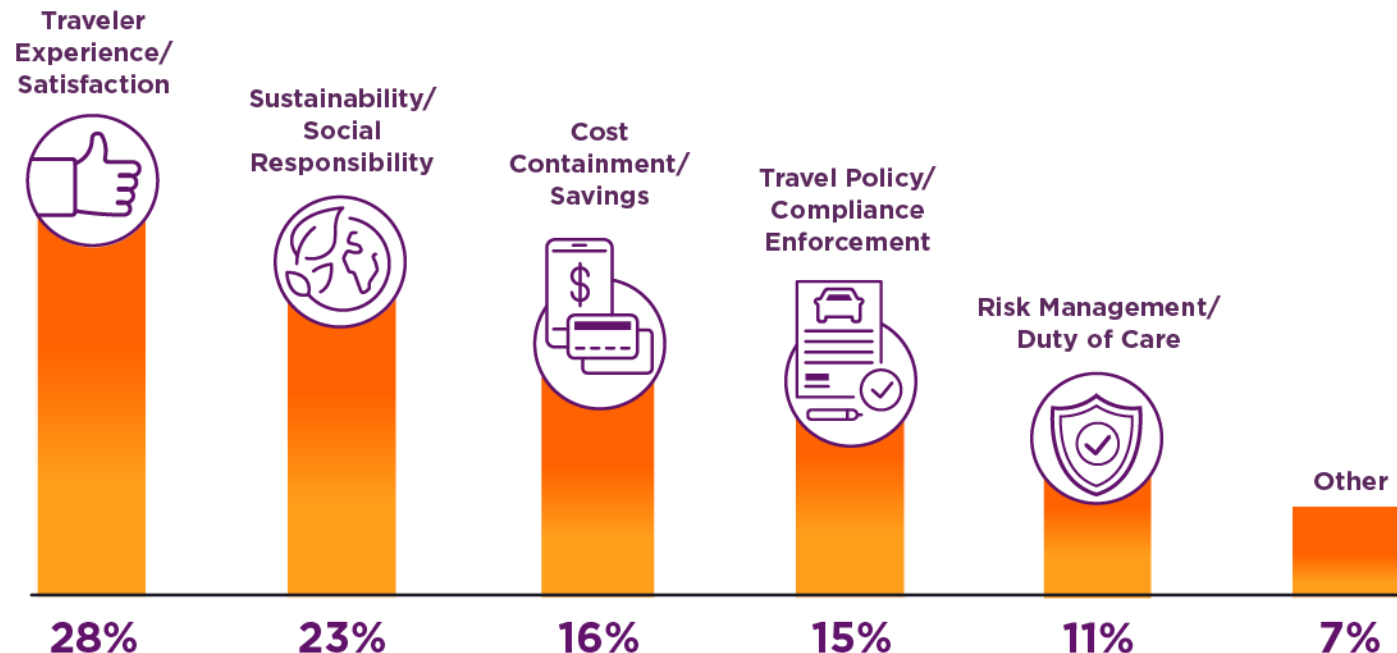
Traveler Experience/ Satisfaction — 28%

Sustainability/ Social Responsibility — 23%

Cost Containment/ Savings — 16%

Travel Policy/ Compliance Enforcement — 15%

Risk Management/ Duty of Care — 11%

Other — 7%

Q. Thinking about your company's travel program overall, which of the following areas do you think is most in need of improvement today? (n=132)

Traveler experience is the most cited pain point. Travel managers were asked to identify which area of their program is most in need of improvement. More than one-quarter (28%) say traveler experience/satisfaction is the area where they need to improve most. This is higher than the share who indicate any other pain point.

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The **Travel Manager's** Perspective

Even though traveler experience is commonly viewed as a pain point, it is not a top priority for the next three years

Where Will Travel Programs Focus the Most Over the Next Three Years?

% included in top 2 (out of five)

Cost Containment/ Savings	Travel Policy/ Compliance Enforcement	Risk Management/ Duty of Care	Traveler Experience/ Satisfaction	Sustainability/ Social Responsibility
60%	57%	46%	29%	9%
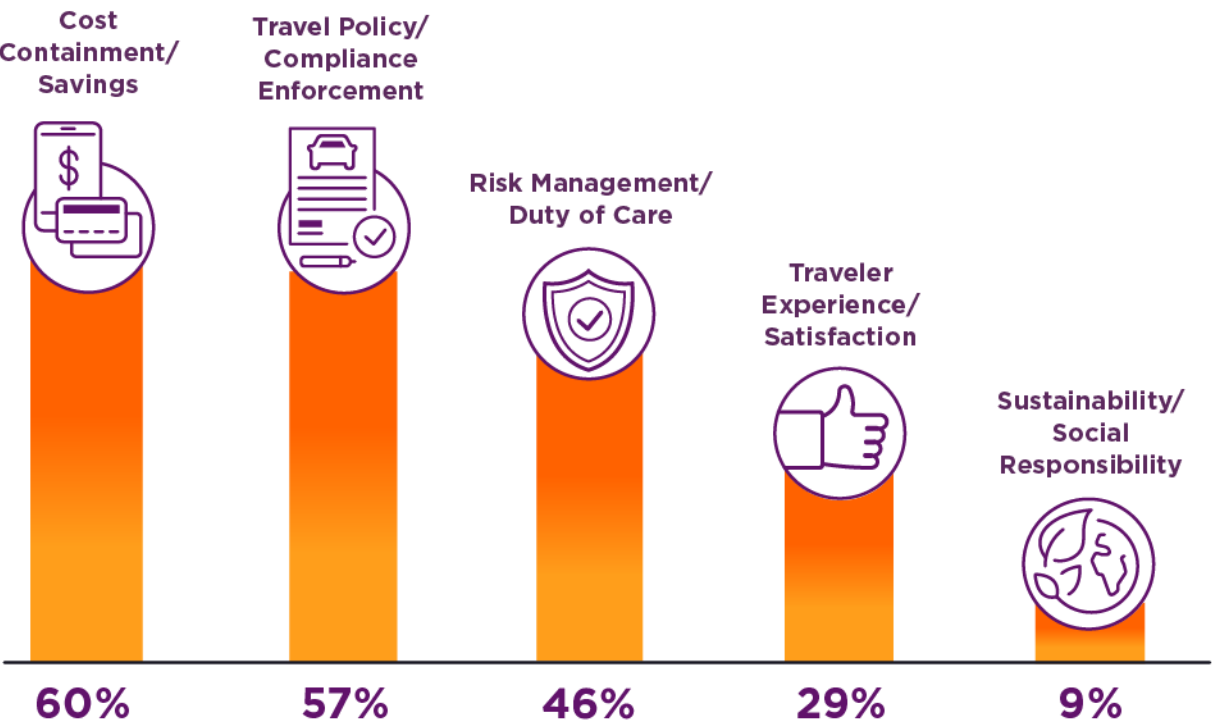
Q. Thinking ahead three years, which of the following areas do you expect your travel program will devote the most attention? (n=129)

Travel programs focus on strengths

Employee satisfaction is more often viewed as a pain point with travel programs than a strength, as shown on the previous two pages.

Looking ahead three years, travel programs will likely prioritize executing on current strengths rather than addressing current pain points. Only 29% include traveler experience/satisfaction as one of the top two areas where they expect to devote the most attention in the next three years.

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The **Business Traveler's** Perspective

Do Business Travelers Think?

The travel program **PRIORITIZES** cost savings over employee satisfaction

Traveler Experience/ Satisfaction

Cost Containment/ Savings

41%
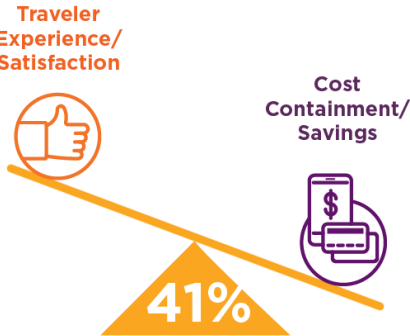
The travel program **BALANCES** cost savings and employee satisfaction equally

Traveler Experience/ Satisfaction

Cost Containment/ Savings

38%

The travel program **PRIORITIZES** employee satisfaction over cost savings

Cost Containment/ Savings

Traveler Experience/ Satisfaction

21%
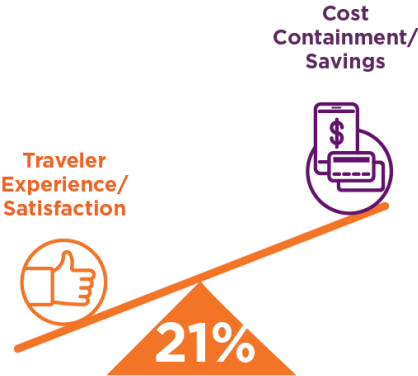
41% of business travelers think their company's travel program prioritizes cost savings over employee satisfaction

Q. Thinking about your company's travel program, which of the following best applies? (n=406)

Almost 2 in 5 business travelers say technology is the single greatest pain point of their company's travel program

Thinking About Your Company's Travel Program…
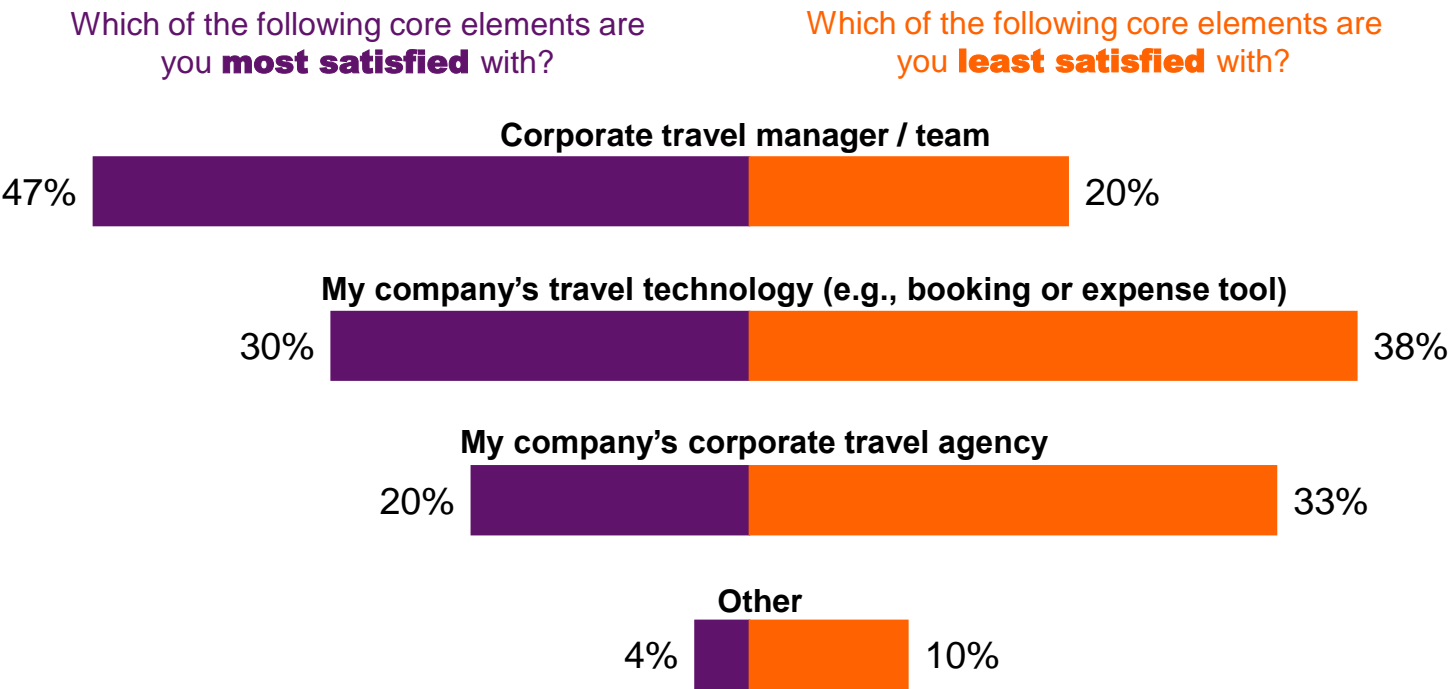
Which of the following core elements are you **most satisfied** with?

Which of the following core elements are you **least satisfied** with?

Corporate travel manager / team

47%   20%

My company's travel technology (e.g., booking or expense tool)

30%   38%

My company's corporate travel agency

20%   33%

Other

4%   10%

Q. Thinking about your company's travel program, which of the following core elements are you most satisfied with? (n=406)

Q. Thinking about your company's travel program, which of the following core elements are you least satisfied with? (n=406)

Almost half of business travelers (47%) say their company's travel manager/team is the single element of the travel program they are most satisfied with. Only one in five (20%) say the travel manager/team is the single element they are least satisfied with.

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How do business travelers view core elements?

Most travel programs have similar core elements. These include internal staff who manage travel-related processes, a travel management company (TMC), and technology such as an online booking tool (OBT) or expense reporting tool. Which of these elements do business travelers view as a strength – and which do they view as a pain point?

- **Corporate travel manager team:** Business travelers generally have favorable views about their company's corporate travel manager/team. Almost half (47%) say this is the core element they are most satisfied with. Only 20% say it is the core element they are least satisfied with.

- **Technology:** Technology is the most cited pain point. While 30% of business travelers say their company's travel technology is the core element they are most satisfied with, a larger number (38%) say it is the element they are least satisfied with. This is higher than the share who indicate they are least satisfied with any other element.

- **TMC:** One in five business travelers (20%) say their company's corporate travel agency is the element they are most satisfied with while one-third (33%) say it is the element they are least satisfied with.

Business travelers want to get back on the road

Which Best Describes Your View?

It depends — 22%

I enjoy traveling for business — 66%

I need to travel for business for my job but I do not enjoy it — 12%
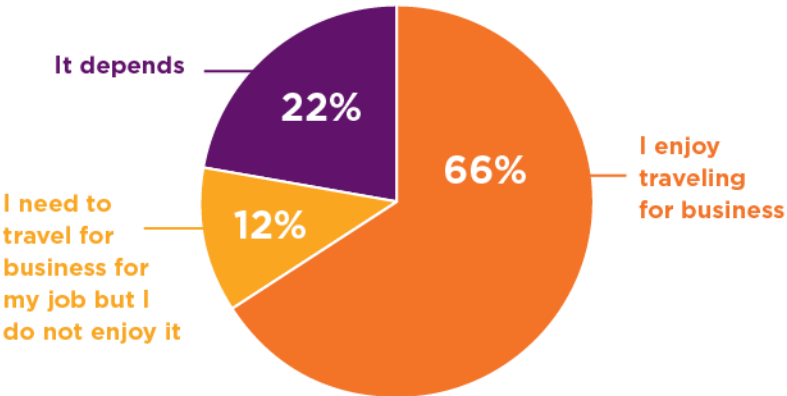
Q. Which of the following best describes your view? (n=405)

How Often Would You Prefer to Travel for Work?

As little as possible — 6%

All of the time — 18%

Every so Often — 30%

Fairly often — 45%
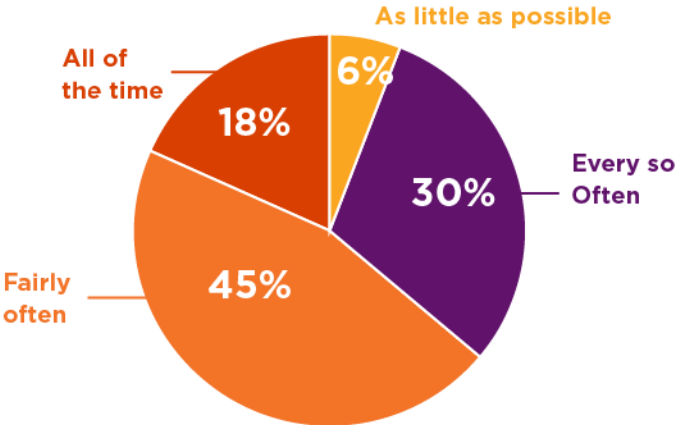
Q. How often would you prefer to travel for business? (n=406)

Do Business Travelers Want to Return to Pre-Pandemic Travel Frequency?

19% I would prefer to travel for work **less often** than I did pre-pandemic

46% I would prefer to travel for work **the same amount** than I did pre-pandemic

35% I would prefer to travel for work **more often** than I did pre-pandemic

Q. Which of the following best describes your view? (n=406)

Business travelers want to get back on the road

Business travelers want to return to their pre-pandemic travel frequency: Most U.S. business travelers (81%) want to return to or exceed their pre-pandemic travel frequency. Almost half (46%) would prefer to travel for work the same amount as they did pre-pandemic. More than one-third (35%) would prefer to travel for work more often than they did pre-pandemic. Only 19% would prefer to travel for work less often than they did pre-pandemic.

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What Can Travel Programs Do to Improve Satisfaction?

Which Measures Do Business Travelers Want Their Company to Pursue?
up to three answers allowed

My company gives me freedom to book with my favorite suppliers (i.e., those with which they have loyalty status) even if these are not "company-preferred" suppliers — **46%**

My company allows me to stay an additional night after my work meeting ends, if I wish — **43%**

"Open-booking": My company allows me to book outside of the corporate travel agency/booking tool, if I wish — **39%**

My company pays for me to have leisure experiences during business trips (i.e., reimbursing me when I take a night tour of a destination during off-hours) — **39%**

My company gives me additional time off for traveling frequently — **34%**

My company's travel policy always allows direct flights — **33%**

My company has special policies for "road warriors" or frequent travelers that are different from the policies it has for all other employees — **27%**

2% None of the above

Business travelers are interested in various perks

Business travelers were presented with seven business travel-related perks and asked to pick up to three that they want their company to offer the most to improve traveler well-being/satisfaction. They most commonly include in their top three freedom to book with favorite suppliers (46%).

Q. Thinking about your company specifically, which of the following measures do you want to see it pursue to improve traveler well-being/satisfaction? Please select up to three. (n=406)

The **Travel Manager's** Perspective

Most travel programs aren't open to letting employees book with their favorite suppliers

Would Your Company Consider…?
Giving travelers freedom to book with their favorite suppliers (e.g., those with which they have loyalty status) even if these are not "company-preferred" suppliers

58% Definitely/probably would NOT consider

16% Might consider, might not

3% Definitely WOULD consider

23% Already DO this

Q. Would your company consider the following measures to improve employee satisfaction or well-being? (n=123)

Preferred suppliers and traveler experience

Preferred suppliers are a staple: "Preferred suppliers "are a staple of corporate travel programs. For decades, travel programs have negotiated discounts and special terms with "preferred" airlines, hotels, and car rental companies.

The traveler experience connection: While preferred suppliers save money, they can impact the traveler experience. For instance, travelers might be unable to book their favorite airlines with which they have loyalty status and qualify for upgrades. Almost half of business travelers (46%) include "freedom to book with favorite suppliers" as one of the top three perks they want their company to offer to improve the traveler experience. However, most travel programs are unlikely to offer this soon, as shown on the left.

A decent number of travel programs are open to allowing employees to stay an additional night

Would Your Company Consider…?
We allow travelers to stay an additional night after their work meeting ends if they wish

26% Definitely/probably would NOT consider

30% Might consider, might not

13% Definitely WOULD consider

31% Already DO this

31% of travel programs already allow employees to stay an additional night after their work meeting ends if they wish

Q. Would your company consider the following measures to improve employee satisfaction or well-being? (n=123)

Open booking dead in the water

Would Your Company Consider…?

"Open-booking": allowing travelers to book outside of our TMC or corporate booking tool if they wish

84%
Definitely/probably would NOT consider

11%
Might consider, might not

2%
Definitely WOULD consider

2%
Already DO this

Q. Would your company consider the following measures to improve employee satisfaction or well-being? (n=123)

"Open booking" policies allow travelers to book outside of the TMC or corporate booking tool if they wish. Travelers are free to book using supplier websites (e.g., Marriott.com) or OTA websites (e.g., Booking.com) all of the time or in certain cases.

Some travelers value open booking: Two in five business travelers (39%) include open booking as one of the top three perks they want their company to offer the most.

Dead in the water: Only 2% of travel programs currently allow open booking. An overwhelming majority (84%) "definitely" or "probably" would NOT consider allowing it. This likely reflects safety concerns. Travel programs rely on managed booking channels to perform key risk management functions such as pre-trip approvals and traveler tracking.

Travel programs are not open to paying for leisure experiences

Would Your Company Consider…?
Paying for leisure experiences during business trips

84% Definitely/probably would NOT consider

11% Might consider, might not

3% Definitely WOULD consider

2% Already DO this

Q. Would your company consider the following measures to improve employee satisfaction or well-being? (n=123)

84% of travel programs would not consider paying for employees to have leisure experiences during business trips

Only 14% of travel managers say their company allows additional time off for frequent travel

Would Your Company Consider…?
Allowing additional time off for frequent travel

46% Definitely/probably would NOT consider

33% Might consider, might not

7% Definitely WOULD consider

14% Already DO this

Our travel policy always allows for direct flights

8% Definitely/probably would NOT consider

15% Might consider, might not

13% Definitely WOULD consider

63% Already DO this

Q. Would your company consider the following measures to improve employee satisfaction or well-being? (n=123)

63% of travel policies always allow direct flights

The **Travel Manager's** Perspective

Most travel programs don't have separate policies for road warriors

Would Your Company Consider…?
Having special policies for "road warriors" or frequent travelers that are different from the policies that we have for all other employees

52% Definitely/probably would NOT consider

28% Might consider, might not

8% Definitely WOULD consider

11% Already DO this

Q. Would your company consider the following measures to improve employee satisfaction or well-being? (n=123)

Separate policies for "road warriors?"

One in 10 travel managers (11%) say their company has "special policies for road warriors or frequent travelers that are different from the policies [they] have for all other employees." These special policies might include several features:

Easier upgrades: Frequent travelers might be allowed to fly business class more often, or stay at nicer hotels.

Streamlined processes: The general travel policy might have strict approval processes for bookings and expense reports. However, it could have more lenient processes for frequent travelers.

Favorite suppliers: Travel programs can give frequent travelers more flexibility to use their favorite suppliers.

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For most business travelers, sustainability Is a moderate priority

Would You Say Reducing or Minimizing Your Carbon Footprint Is…?
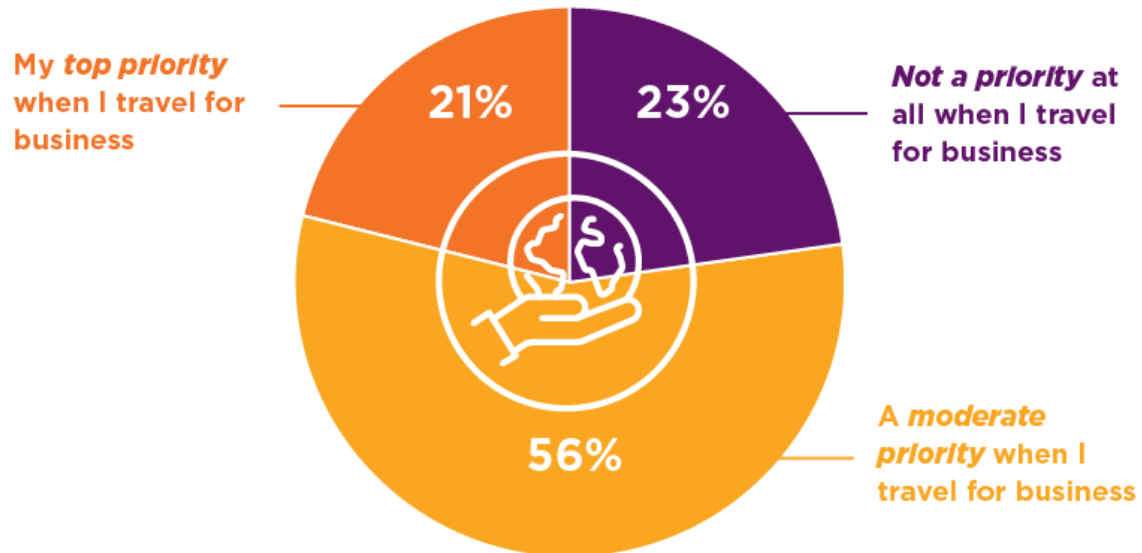
My *top priority* when I travel for business — 21%

23% — *Not a priority* at all when I travel for business

56% — A *moderate priority* when I travel for business

For most business travelers, reducing their carbon footprint is a moderate priority when they travel for work.

Almost four in five business travelers (77%) say reducing their carbon footprint is a moderate priority or their top priority when they travel for business. However, they are more likely to say it is a moderate priority (56%) than their top priority (21%).

Q. Would you say reducing your minimizing your carbon footprint is…? (n=406)

Reducing emissions is a bigger priority for younger business travelers

Would You Say Reducing or Minimizing Your Carbon Footprint Is…?
by age

Not a priority at all when I travel for business
- 16%
- 23%
- 38%

A moderate priority when I travel for business
- 62%
- 52%
- 51%

My top priority when I travel for business
- 22%
- 24%
- 11%

■ 18 to 34 (n=158)   ■ 35 to 54 (n=166)   ■ 55 or older (n=82)
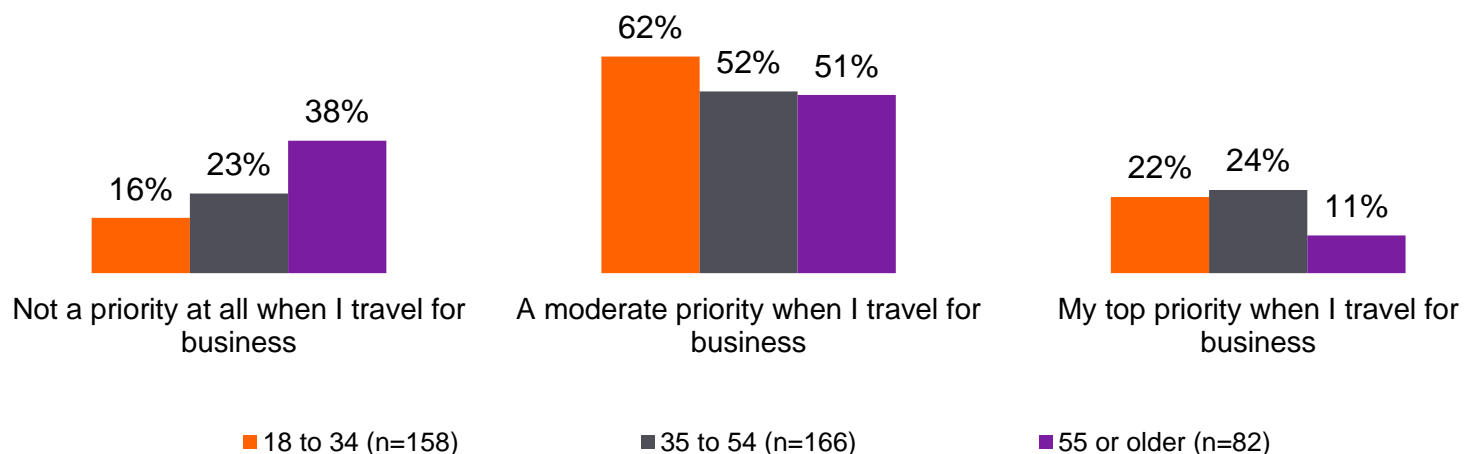
Q. Would you say reducing your minimizing your carbon footprint is…?
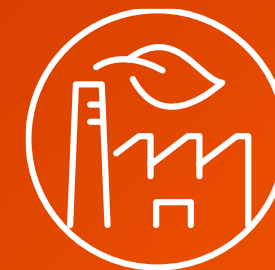
Reducing carbon emissions is a greater priority for younger business travelers. While 38% of older business travelers (ages 55+) say reducing emissions is "not a priority at all" when they travel for work, only 16% of younger travelers (ages 18 to 34) say so.

Some travel manager think it is reasonable for employees to make sacrifices to reduce emissions

Is It Reasonable to Expect Business Travelers to Make Various Sacrifices to Reduce Emissions?

■ No - it is not reasonable ■ Yes - it is somewhat reasonable ■ Yes - it is completely reasonable ■ Not sure

Category	No	Somewhat	Completely	Not sure
Travelers are expected to take fewer business trips	20%	48%	25%	7%
Travelers are expected opt-out of daily hotel room cleanings	21%	41%	31%	7%
Travelers are expected to rent smaller cars (i.e., compact instead of intermediate)	24%	52%	18%	6%
Travelers are required to fly premium class (e.g., business or first class) less often	30%	33%	23%	15%
Travelers are expected to rent electric vehicles (EVs) or hybrid cars	38%	39%	11%	12%
Travelers are required to take longer time to travel (e.g., by train instead of airplane) to reduce carbon emissions	63%	27%	2%	7%

Q. Do you think it is reasonable to expect travelers to make the following sacrifices in order to reduce the carbon footprint of your company's business travel? (n=122)

Some travel managers think it is reasonable to expect business travelers to make sacrifices in order to reduce carbon emissions. A majority think it is "somewhat" or "completely" reasonable to expect employees to take fewer business trips (73%), opt-out of daily room cleanings (72%), rent smaller cars (70%), and fly premium class less often (56%).

Business travelers willing to sacrifice to reduce emissions

Are Business Travelers Willing to Make Various Sacrifices to Reduce Emissions?

■ Not willing at all   ■ Not willing   ■ Neither willing nor unwilling   ■ Willing   ■ Very willing

% willing + very willing

Category	Not willing at all	Not willing	Neither	Willing	Very willing	% willing + very willing
Renting electric vehicles (Evs) or hybrid cars	6%	4%	10%	40%	39%	**80%**
Opting out of daily hotel room cleanings	4%	6%	13%	44%	33%	**77%**
Renting smaller cars (i.e., compact instead of intermediate)	7%	5%	15%	43%	30%	**73%**
Flying premium class (e.g., business or first class) less often	6%	6%	19%	40%	28%	**68%**
Taking fewer business trips	6%	8%	22%	42%	21%	**63%**
Longer travel times (e.g., by train instead of airplane) to reduce carbon emissions	12%	14%	18%	36%	20%	**56%**

Q. Please rate your willingness to make the following sacrifices in order to reduce the carbon footprint of your business trips (n=406).

Business travelers are willing to sacrifice in order to reduce carbon emissions. Most are willing to opt out of daily room cleanings (77%), rent smaller cars (73%), fly premium class less often (68%), take fewer business trips (63%) and even travel for longer periods of time to reduce emissions (56%).

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Travel Program Metrics and KPIs

Most travel programs use key performance indicators (KPIs) – but a significant minority don't

Do Travel Programs Use Key Performance Indicators to Evaluate the Performance of…?

- ■ Yes
- ■ No
- ■ Don't know

	Yes	No	Don't know
Cost savings	68%	29%	3%
Program compliance	65%	32%	4%
Our TMC	63%	35%	2%
Our corporate online booking tool (OBT)	53%	43%	4%
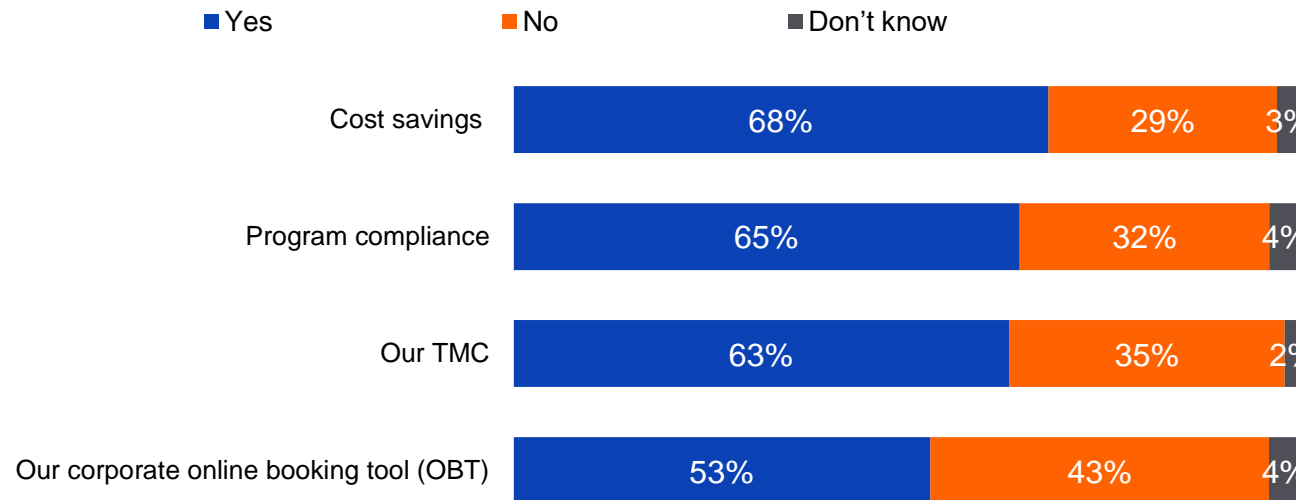
Q. Does your company use key performance indicators (KPIs) to evaluate the performance of…? (n=105-113)

35% of travel programs don't use KPIs to evaluate their TMC's performance

A decent number of travel programs still don't survey employees about satisfaction with key elements

How Often Do Travel Programs Survey Employees About…?

- ■ We do not conduct surveys
- ■ We survey at regular intervals (e.g., annually, semi-annually, quarterly)
- ■ We survey after every trip
- ■ We survey randomly (e.g., random sample of business travelers)
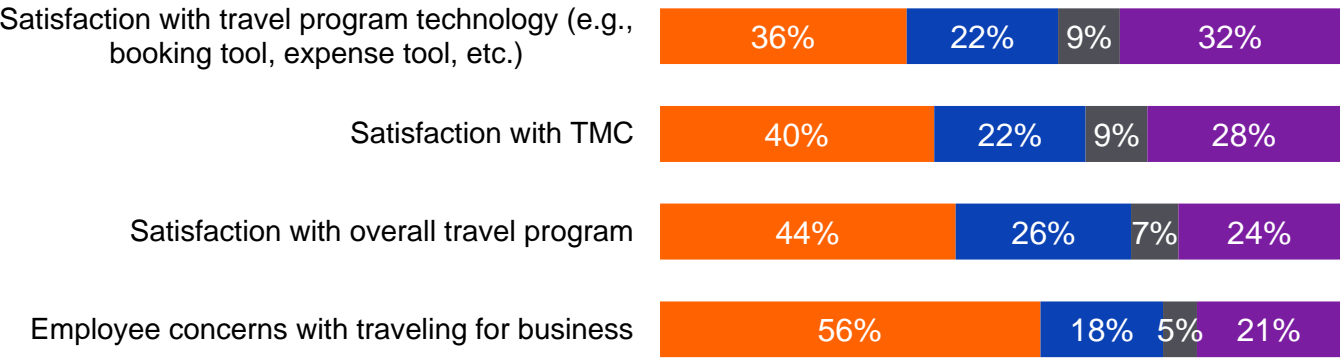
Satisfaction with travel program technology (e.g., booking tool, expense tool, etc.)	36%	22%	9%	32%
Satisfaction with TMC	40%	22%	9%	28%
Satisfaction with overall travel program	44%	26%	7%	24%
Employee concerns with traveling for business	56%	18%	5%	21%

Q. Which of the following best describes your company's approach to conducting surveys of business travelers about …? (n=117)

Travel programs can conduct employee surveys to solicit feedback. However, a surprising number do not conduct surveys.

Satisfaction with travel program: Companies can survey about satisfaction with the overall travel program. They can ask employees if they are happy with travel policies and the communication of the internal travel team. More than two in five travel programs (44%) do not survey about satisfaction with the overall travel program.

Satisfaction with TMC: Two in five travel programs (40%) do not survey about satisfaction with the company's travel management company (TMC).

Satisfaction with travel program technology: More than one-third (36%) do not survey about satisfaction with travel program technology (e.g., booking or expense tool).

Are there differences by travel spend?

% of Travel Programs That Do Not Conduct Surveys About…
by pre-pandemic annual business travel spend
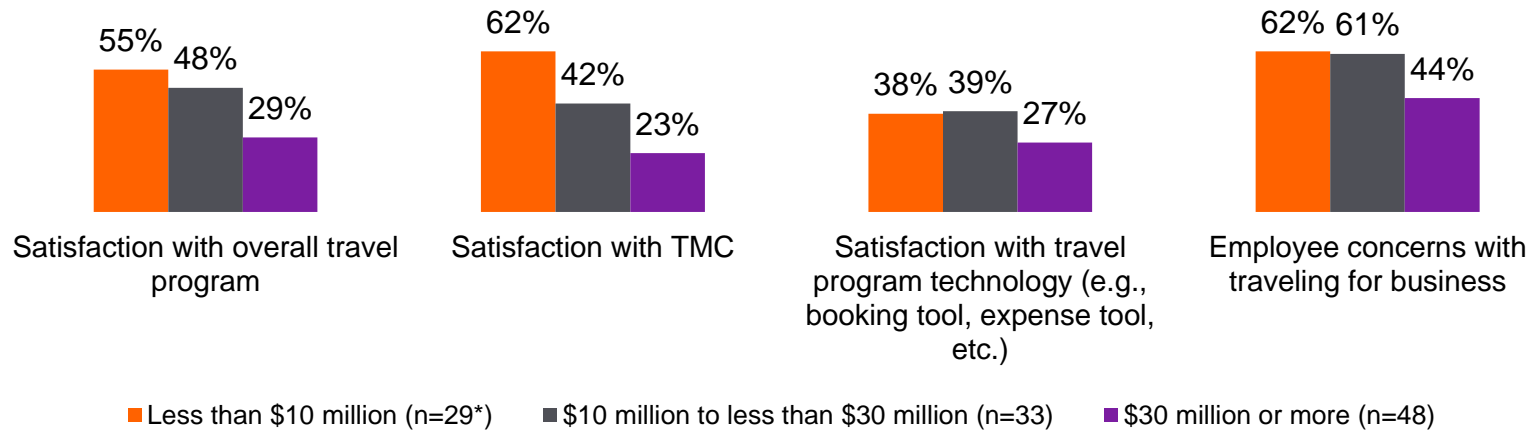
Satisfaction with overall travel program
- 55%
- 48%
- 29%

Satisfaction with TMC
- 62%
- 42%
- 23%

Satisfaction with travel program technology (e.g., booking tool, expense tool, etc.)
- 38%
- 39%
- 27%

Employee concerns with traveling for business
- 62%
- 61%
- 44%

■ Less than $10 million (n=29*)   ■ $10 million to less than $30 million (n=33)   ■ $30 million or more (n=48)

Q. Which of the following best describes your company's approach to conducting surveys of business travelers about …?
*small sample size for companies with less than $10 million of pre-pandemic annual business travel spend (n<30)

Smaller travel programs appear less likely to survey.

33

Business travelers are largely happy with how often their company conducts travel-related surveys

Do You Think Your Company Conducts Travel-Related Surveys…?

Too frequently
7%

My company *doesn't* conduct travel-related surveys
35%

The right amount
45%

13%
Too infrequently
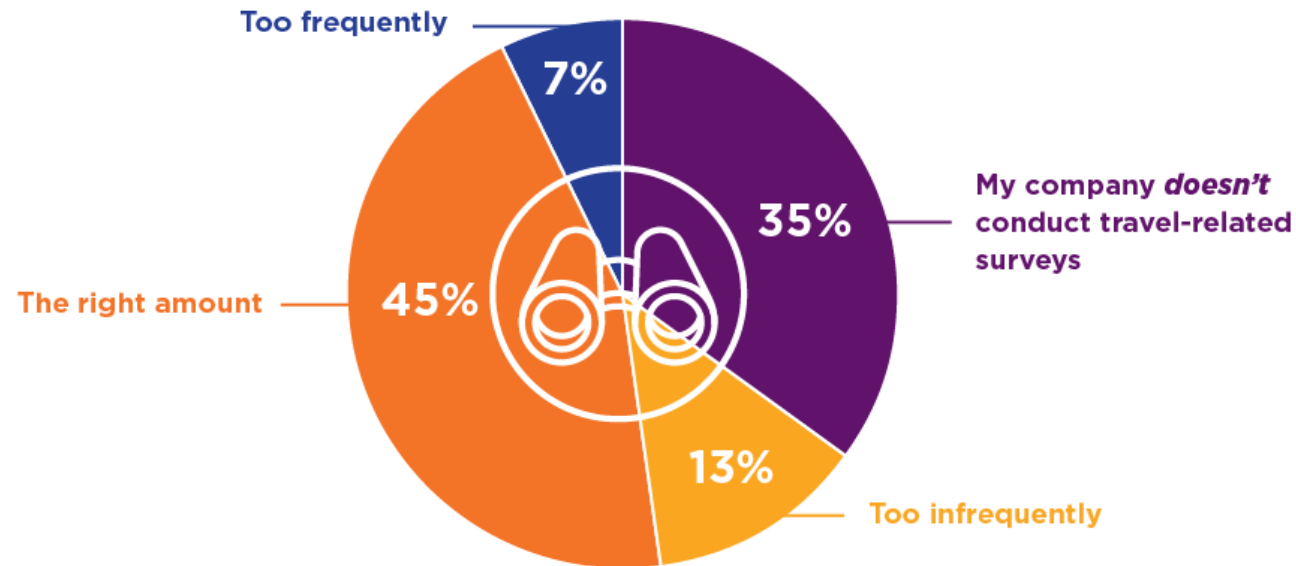
Q. Do you think your company conducts travel-related surveys…? (n=406)

Business travelers are largely happy with how often their company conducts travel-related surveys.

While more than one-third (35%) say their company does not conduct travel-related surveys, the remainder are largely happy with how often their company does so. Almost half of all respondents (45%) say their company conducts travel-related surveys the right amount. Only 13% say it conducts surveys too infrequently and only 7% say it conducts surveys too frequently.

34

Do travel programs calculate net promoter scores?

Do Travel Programs Calculate Net Promoter Scores for…?

■ Yes　　　　　■ No　　　　　■ Don't know

Category	Yes	No	Don't know
Our TMC	16%	70%	14%
Our overall travel program	9%	78%	14%
Our corporate online booking tool (OBT)	11%	74%	15%
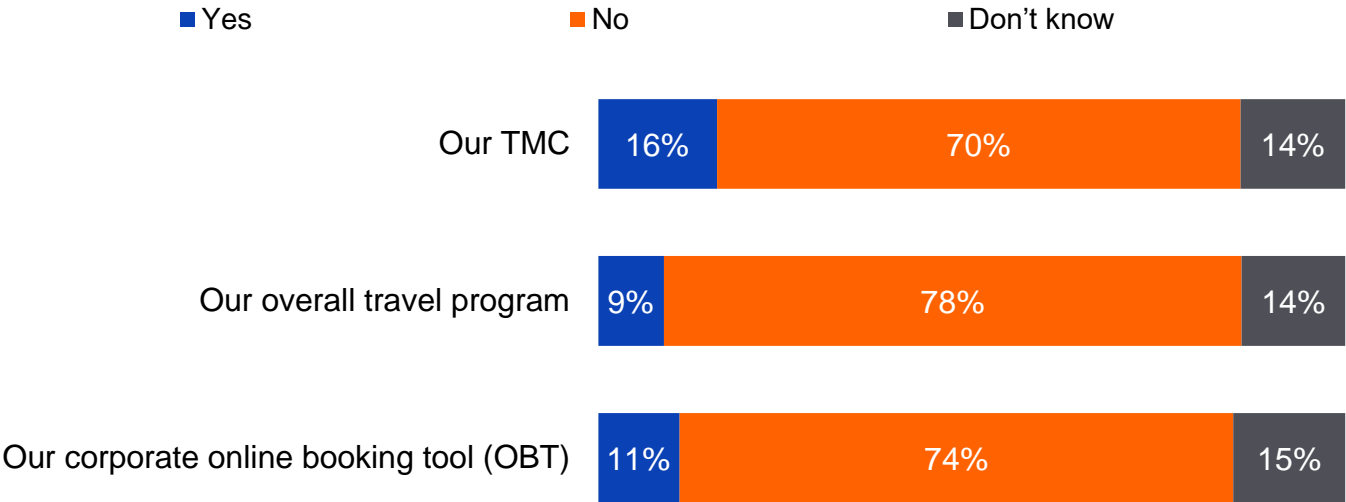
Q. Does your company calculate net promoter scores (NPS) for the following…? (n=105-113)

16% of travel programs calculate net promoter scores for their TMC

Accessible Business Travel

Most travel programs don't have clearly defined processes/resources for accessible business travel

How Do Travel Managers Rate Their Company's Approach to Accessible Business Travel?

We *have clearly defined processes/* resources and need to improve how we handle these requests — 16%

We have clearly defined processes / resources that are *largely effective* — 20%

We have clearly defined processes / resources but these *need some improvement* — 12%

We *do not have* clearly defined processes / resources — but do a good job handling these requests on an ad-hoc basis — 50%
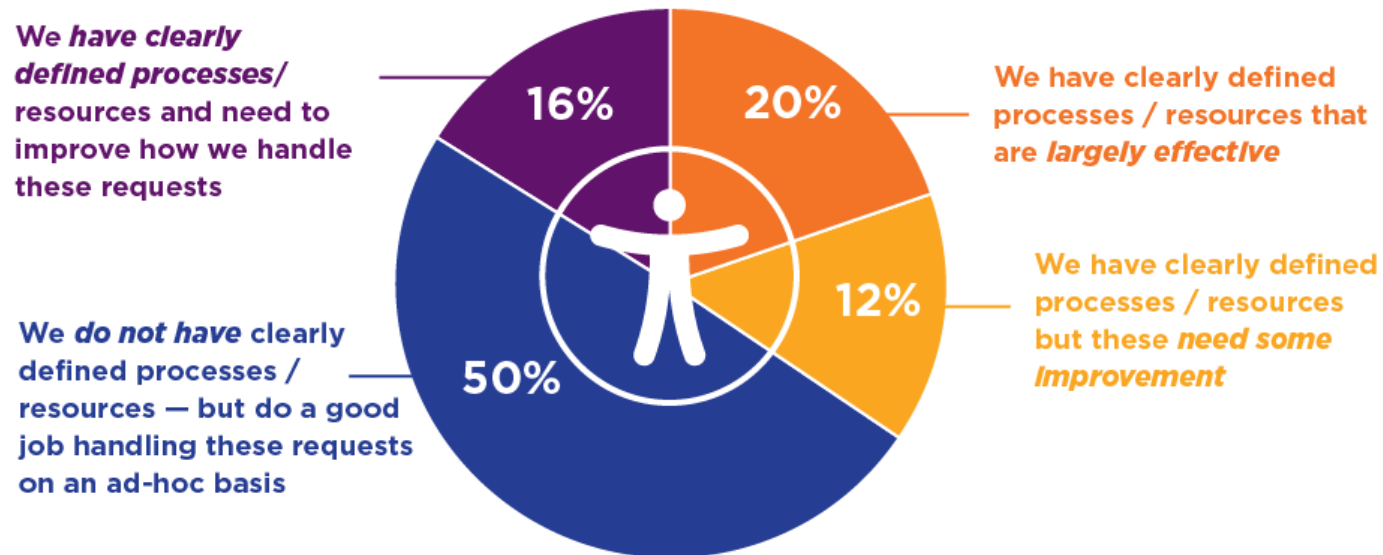
Note: 3% of respondents indicated "other" (not shown)

Q. How would you rate your travel program's approach to accessible travel?
This includes trips taken by employees with special needs such as mobility impairment (e.g., wheelchair or walker), vision impairment (e.g., partially or fully blind), or mental health concerns (e.g., anxiety about travel) (n=128).

Most travel programs do not have clearly defined processes or resources for employees with accessibility needs.

Only one-third of travel managers (32%) say their company has clearly defined processes or resources for accessible travel. This includes one in five (20%) who say they have clearly defined processes and resources that are largely effective and one in 10 (12%) who have processes or resources that need some improvement. However, this does not necessarily mean that travel programs neglect these employees. Half of travel managers (50%) say their company does not have clearly defined processes or resources - but does a good job handling these requests on an ad-hoc basis.

37

Do large travel programs do a better job with accessible travel? Sometimes but not always

How Do Travel Managers Rate Their Company's Approach to Accessible Travel?
by pre-pandemic annual business travel spend

	We have clearly defined processes/resources that are largely effective	We have clearly defined processes/resources – but these need some improvement	We do not have clearly defined processes/resources – but do a good job handling these requests on an ad-hoc basis	We do not have clearly defined processes/resources and need to improve how we handle these requests
Less than $10 million (n=29*)	14%	10%	55%	14%
$10 million to less than $30 million (n=33)	12%	9%	55%	24%
$30 million or more (n=48)	27%	10%	48%	13%

■ Less than $10 million (n=29*)   ■ $10 million to less than $30 million (n=33)   ■ $30 million or more (n=48)

Q. How would you rate your travel program's approach to accessible travel? This includes trips taken by employees with special needs such as mobility impairment (e.g., wheelchair or walker), vision impairment (e.g., partially or fully blind), or mental health concerns (e.g., anxiety about travel).
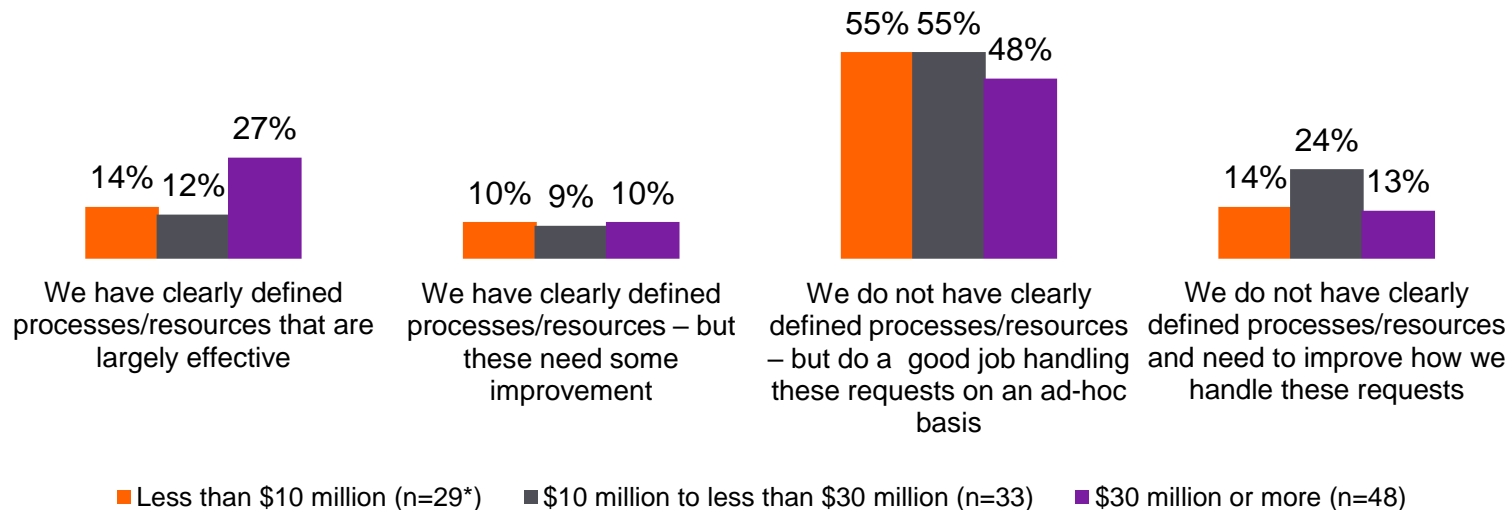***small sample size for companies with less than $10 million of annual pre-pandemic travel spend (n<30)**

Only some large travel programs fare better.

One-quarter of high spend travel programs (27%) have clearly defined processes/resources for accessible business travel that are largely effective. While this is higher than the share of low (14%) and medium-spend programs (12%) that have effective processes/resources, it is far from a majority.

38

The GBTA GLP Accessible Travel Toolkit

- **Few travel programs have formal processes:** Only one in five travel managers (20%) say their company has clearly defined processes or resources that are largely effective. An additional one in 10 (12%) say their company has defined processes or resources – but these need some improvement.

Accessible travel is a complex issue and it can be difficult to know how to get started. With this in mind, a group of business travel professionals recently designed the GBTA Accessible Travel Tool Kit for their Global Leadership Program Professional Program (GLP) capstone project. The Toolkit is designed to help corporate travel programs improve how they serve employees with accessibility needs. It can help all travel programs including those who have well-developed processes and those that are just getting started. The Toolkit is divided into several sections:

- **A self-assessment:** The Tool Kit provides a number of questions designed to help travel programs assess how well they currently serve employees with accessibility needs and what they can do to improve.

- **A case study:** The Tool Kit provides an overview of Microsoft's approach to accessibility.

- **"Inclusive travel tips:"** The Tool Kit provides tips for travel managers to talk about accessibility needs with travelers in an understanding way. It also provides travel policy tips.

- **Additional resources:** The Tool Kit provides more than a dozen additional resources that travel managers can read or share with employees. These include links to the Americans With Disabilities Act, industry articles in *Skift* and *Business Travel News*, and a website—brettapproved—that can help business travelers identify accessible hotels and restaurants.

GBTA members can access the Toolkit on the GBTA Hub.

Sources: GBTA, *GBTA GLP Accessible Tool Kit*. Alexandria, VA: GBTA, 2022. https://hub.gbta.org/files/3734

How do travel programs develop accessibility processes/resources?

How Do Travel Programs Develop Accessibility Processes/Resources?

We developed these in collaboration with a third party (e.g., TMC or outside consultant) — 23%

We developed these internally — 77%

Travel programs develop accessibility protocols internally.

Of the travel programs that have clearly defined processes or resources for accessible travel, more than three-quarters (77%) developed these internally.
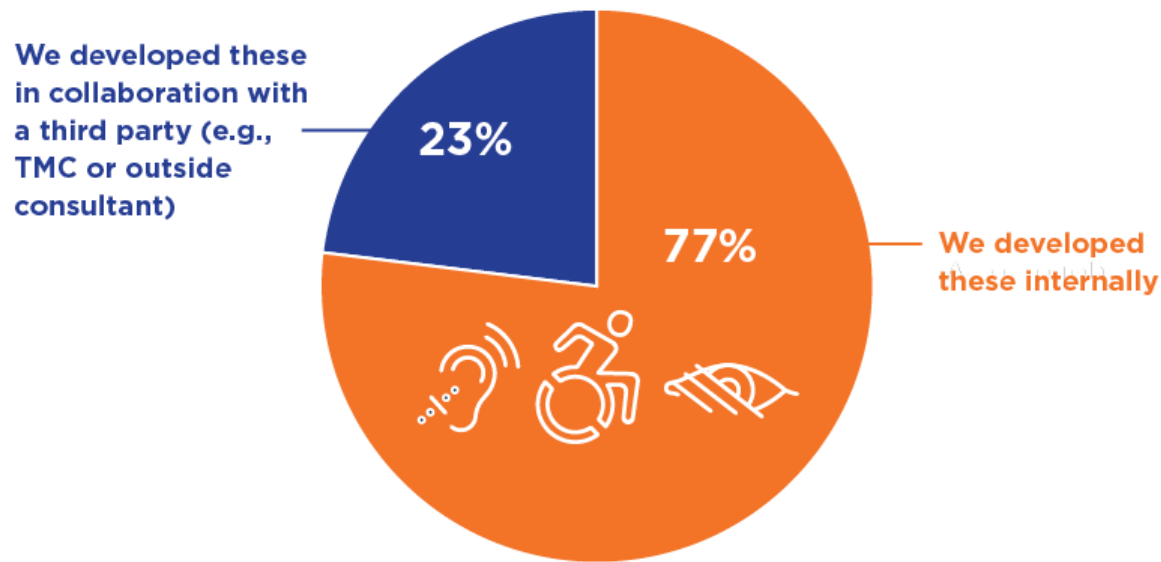
Q. You mentioned your company has clearly defined processes/resources for accessible travel. How did your company develop these?
Note: Question only displayed to respondents who indicated their company has accessibility processes/resources that are largely effective or need improvement (n=39).

40

Business travelers largely say their company does a good job supporting accessibility needs

Which of the following Best Describes Your View?

49%
My company does a GREAT job supporting my needs

44%
My company does a PRETTY GOOD job supporting my needs

1%
My company does a POOR JOB supporting my needs

6%
My company does a SO-SO job supporting my needs

Business travelers largely say their company does a good job supporting accessibility needs.

Of the travelers who indicate they have accessibility needs and require special accommodation when booking a trip or traveling, a large majority say their company does a great job (49%) or a pretty good job (44%) supporting their needs.

Q.You mentioned you require special accommodations when planning a business trip or traveling for business. Thinking about these accommodations, which of the following best describes your view? **Note: Question only displayed to respondents who said they have accessibility needs and require special accommodation when booking a business trip or traveling for business (n=176)**

41

Most travel managers don't have insight into how many employees have accessibility needs

Do You Have Insight Into How Many Business Travelers at Your Company…?

Legend: ■ No, we do not have a good idea   ■ Yes, we have a pretty good idea   ■ Yes, we have a very good idea   ■ Not sure

Have mobility impairments and need special accomodations while traveling
| 48% | 15% | 10% | 27% |

Audio/hearing impairments
| 52% | 10% | 7% | 31% |

Have vision impairments that can make it difficult to book travel
| 53% | 8% | 7% | 32% |

Mental health concerns/impairments
| 57% | 4% | 6% | 33% |

Q. Do you have insight into how many of the business travelers at your company…? (n=115)

Are "hidden" accessibility needs a concern?

Only 25% have a "pretty good" or "very good" idea about how many of business travelers at their company "have mobility impairments and need special accommodations while traveling." Only 15% have a "pretty good" or "very good " idea about how many travelers have "vision impairments that can make it difficult to book travel."

Many travelers might have "hidden" accessibility needs. These make it difficult to book travel or go on business trips. However, these are not severe to the extent that employees would request assistance or try to opt-out of trips. With this in mind, travel programs should consider making special accommodations—and proactively communicate about resources available— even if few employees have specifically requested assistance.
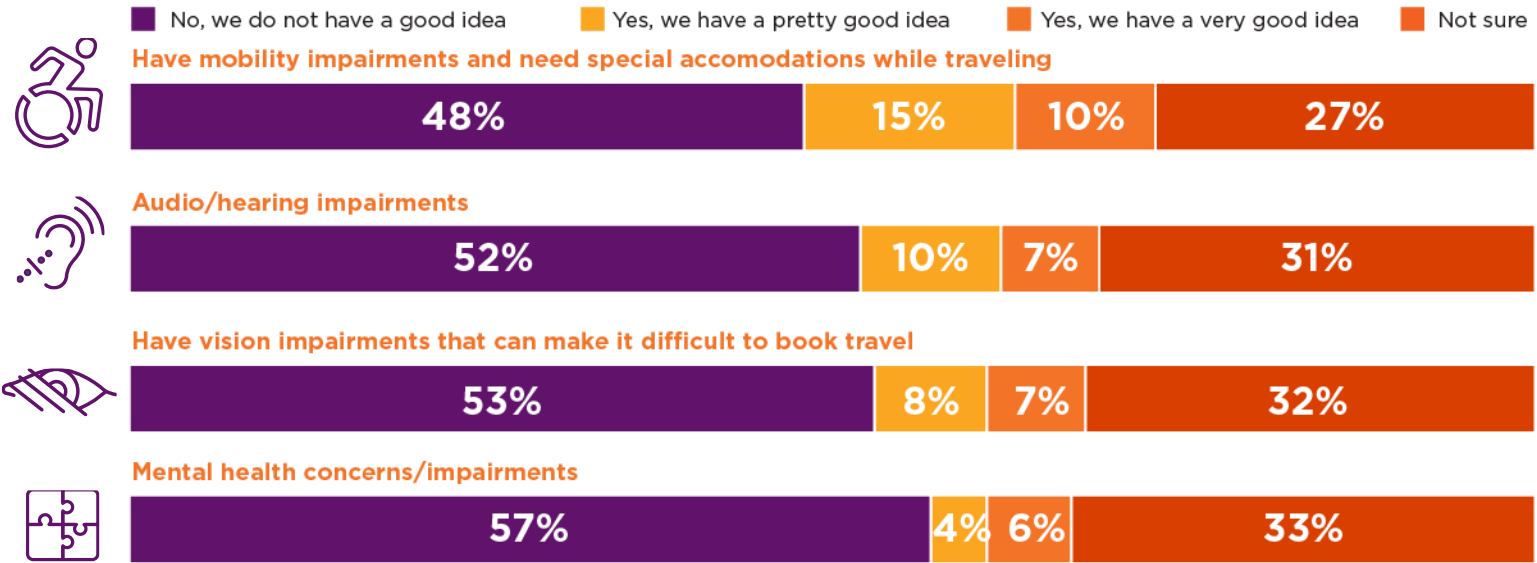
Large travel programs might have less insight into employee accessibility needs

Do You Have Insight Into How Many Business Travelers at Your Company…?
% "very good idea" + "pretty good idea" by pre-pandemic annual business travel spend

Have mobility impairments and need special accommodations while traveling
- 34%
- 18%
- 23%

Audio/hearing impairments
- 21%
- 18%
- 10%

Have vision impairments that can make it difficult to book travel
- 21%
- 15%
- 8%

Mental health concerns/impairments
- 21%
- 6%
- 4%

■ Less than $10 million (n=29*) ■ $10 million to less than $30 million (n=33) ■ $30 million or more (n=48)
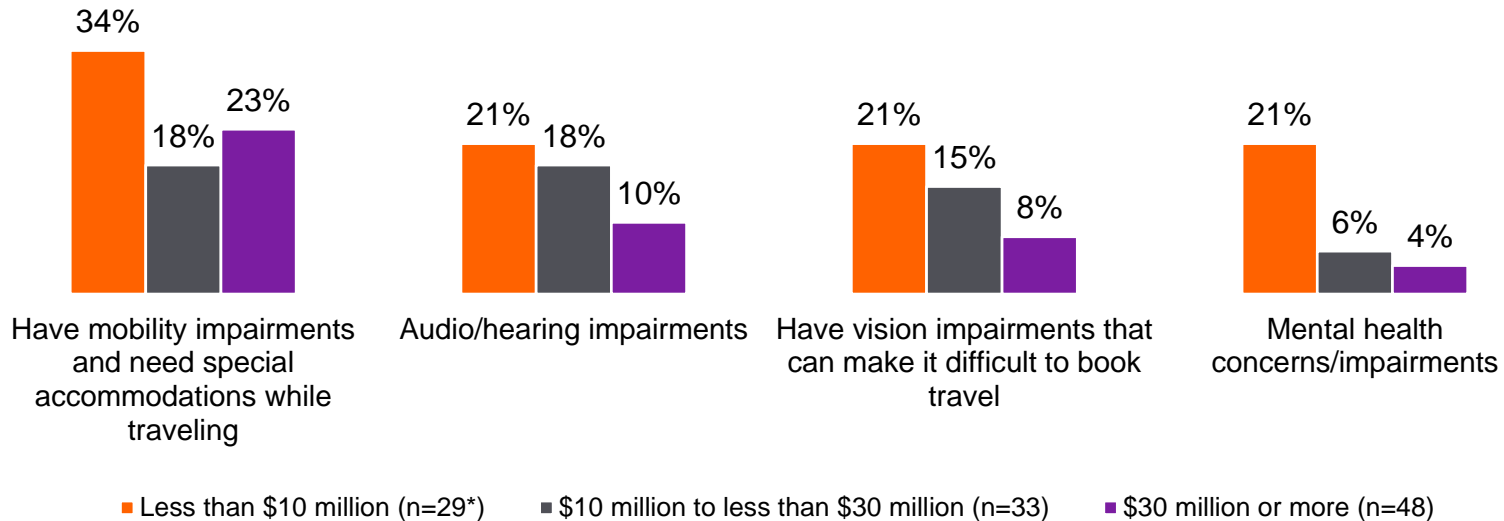
Q. Do you have insight into how many of the business travelers at your company…?
*small sample size for travel managers at companies with less than $10 million of pre-pandemic travel spend

Do large programs have less insight into accessibility needs?

Large travel programs might have less insight into employee accessibility needs. This could reflect that large companies have more employees. This makes it difficult for travel managers to interact with travelers and understand their unique needs. If travel managers cannot learn about employee needs through personal interactions, they should have processes in place to gather this information in other ways (e.g., using traveler profiles) .

43

How are trips for employees with accessibility needs *typically* booked?

How Does Your Travel Program Approach Bookings for Employees With Accessibility Needs?

Not Sure 20%

18% — These are typically booked using corporate online booking tools

Other 7%

These are typically booked with specialty suppliers

These are typically booked by our travel manager/travel team

9%

44% — These are typically booked by our TMC's travel agents
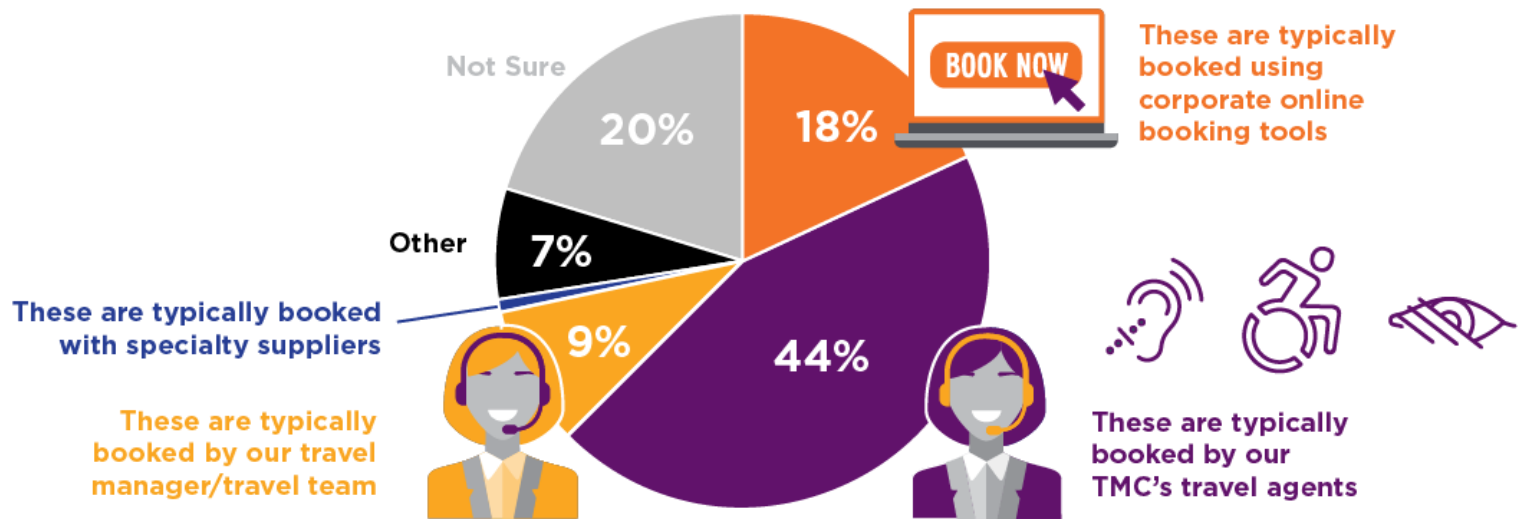
Q. Thinking about your travel program, which of the following best describes its approach to bookings by travelers with accessibility needs (e.g., mobility impaired, vision impaired, etc.)? **Note: Question only displayed to respondents who indicated business travelers at their company make bookings through a corporate online booking tool (n=108).**

How are accessibility trips typically booked?

A decent number of travel managers (20%) are not sure how employees with accessibility needs typically book work trips. This could reflect that travel managers have limited insight into how many employees actually have accessibility needs. Two in five (44%) say these employees typically book on the phone with a TMC agent who can help them address their unique needs. Only 18% say these employees typically book on their own using a corporate booking tool.

44

Travel programs do not typically use agents that specialize in accessibility bookings

How Do Employees With Accessibility Needs Book Through TMCs?
among those who indicated these employees typically book through a TMC agent

- Our employees with disabilities or special needs call/email the TMC and book with any available agent
- Our TMC has travel agents that specialize in these bookings and work with our employees; but employees commonly use different agents for different bookings
- Our TMC has travel agents that specialize in these bookings –and employees with disabilities use the same agent(s) repeatedly so these agents can develop an understanding of their unique needs
- Other
- None of the above

94%

Some travel agents specialize in accessible travel.

Of the travel managers who say their company typically books trips for employees with accessibility needs through TMC agents, an overwhelming majority (94%) say employees with disabilities or special needs book with any available agent.

Q. You mentioned employees with disabilities or special needs typically book through your TMC. Which of the following best describes your approach? **Note: Question only displayed to respondents who indicated bookings for travelers with accessibility needs are typically made through a TMC agent.**

45

Do corporate booking tools accommodate accessibility needs?

Do You Think Your Company's OBT Does…?

A poor job accommodating travelers with accessibility needs — 20%

A so-so job — 17%

A pretty good job — 21%

A great job accommodating travelers with accessibility needs — 5%

Not sure — 37%
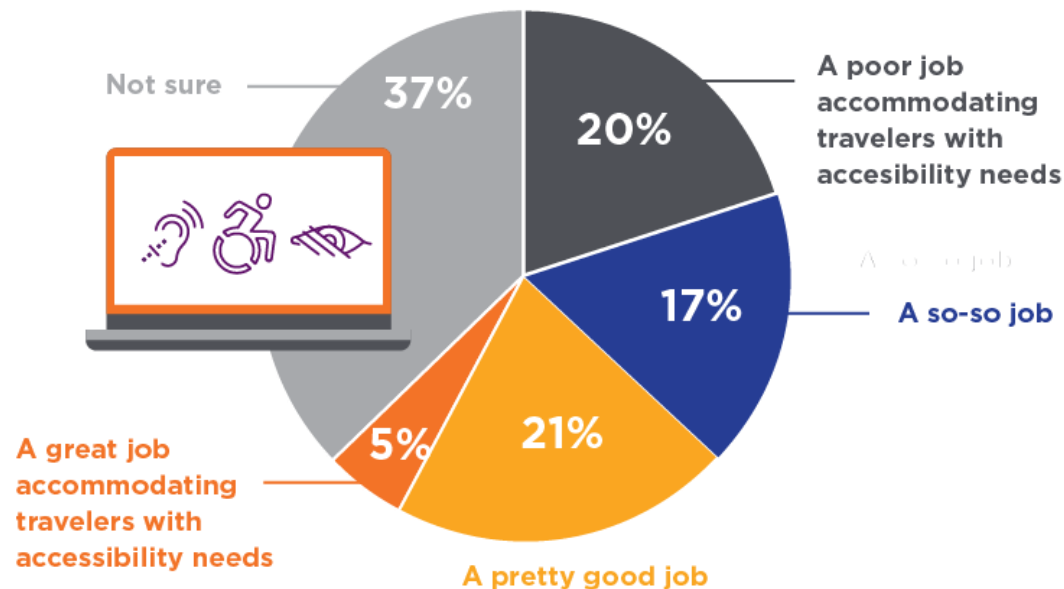
Only one-quarter of travel managers (26%) say their company's primary corporate booking tool does a "pretty good job" or a "great job" accommodating employees with accessibility needs.

Almost two in five say (37%) their corporate booking tool does a "so-so job" or a "poor job" accommodating these travelers. In addition, a decent number (37%) are not sure if their booking tool does a good job accommodating these travelers.

Q. Thinking about the primary corporate online booking tool (OBT) that your company uses, would you say?
Note: Question only displayed to respondents who indicated employees at their company book through an OBT (n=107).

46

Are corporate booking tools accessible?

How do travelers with accessibility needs book business trips? Many book through TMCs. More than two in five travel managers (44%) say employees with accessibility needs (or their company) typically call a TMC agent to book their business trips. Only 18% say these employees typically book through an OBT. One in five (20%) are not sure how these trips are typically booked.

OBTs have room to improve: Only 26% of travel managers say their OBT does a "pretty good" (21%) or "great job" (5%) accommodating travelers with accessibility needs. A decent number (37%) are not sure how well their OBT accommodates accessibility needs. This could reflect that some travel managers have limited understanding of this issue.

What can OBTs do? There are several ways that OBTs can accommodate accessibility needs:

- **Accessible interface:** People sometimes have impairments that make it difficult to book trips. For instance, they can have vision impairments, or motor impairments that make it difficult to type or click with a mouse. This makes it important for OBTs to have an accessible interface. OBTs can be designed according to accessibility principles (such as the W3C framework) that make it easier for these people to use. Seven in 10 travel managers (71%) say an accessible interface is an important factor when selecting an OBT for their company (see page 61).

- **Accessible options:** Some people have accessibility needs that make it difficult to actually travel. In this scenario, it is important for the OBT to highlight accessible options. A large majority of travel managers (79%) say ability to "highlight accessibility features of travel suppliers such as flights, hotels, or rental cars" is an important consideration when they are selecting an OBT for their company (see page 61).

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Many Voices. One Purpose.

Booking and Corporate Online Booking Tools

Is travel program "leakage" in decline?

What Percentage of the Following Types of Bookings Are Made Outside of "Managed" Corporate Channels (i.e., TMC or OBT)?
averages calculated from open-end responses

9%

average percentage of **flights** booked outside of "managed" channels (TMC or OBT)

22%

average percentage of **hotels** booked outside of "managed" channels (TMC or OBT)

15%

average percentage of **rental cars** booked outside of "managed" channels (TMC or OBT)
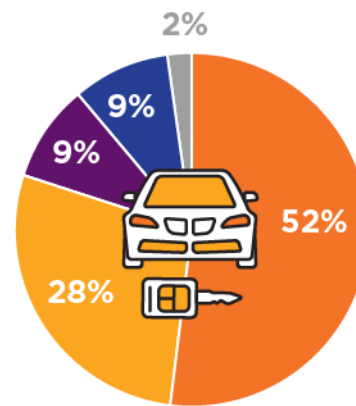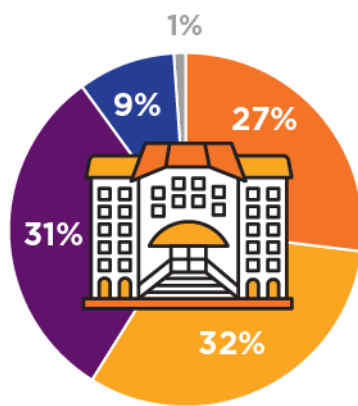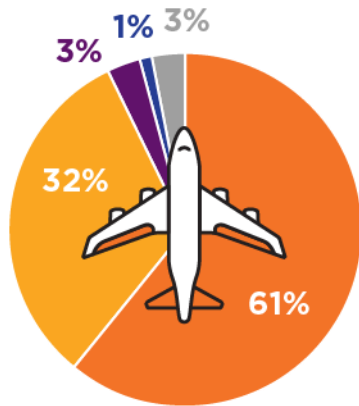
Q. Thinking about the following types of bookings, approximately what percentage are made outside of "managed" corporate channels (i.e., TMC or OBT)? For each type, please enter a number. Your best estimate is fine. **Note: Question only displayed to respondents who indicated travelers at their company make bookings through a corporate online booking tool. (n=100-101)**

Travel programs tackle "leakage"

Travel programs appear to be doing a good job tackling hotel leakage. On average, U.S. travel managers estimate that 9% of their company's air bookings and 22% of its hotel bookings are made outside of managed channels (i.e.,TMC or OBT). In a 2018 GBTA survey, U.S. travel managers estimated that 13% of their company's air bookings and 35% of its hotel bookings were made outside of managed channels.

Sources: GBTA, Lost in Translation: Changing Landscape, Familiar Challenges. Alexandria, VA: GBTA, 2018. https://hub.gbta.org/files/3658.

49

Why Does Leakage Occur?

The **Travel Manager's** Perspective	The **Business Traveler's** Perspective

Why Do You Think Employees Book Outside of the OBT?

Why Do You Commonly Book Outside of Your Company's Corporate Booking Tool/Travel Agency?

Attending a conference and want to book conference rate/room block
84% | 41%

Have loyalty status and want to earn points
43% | 50%

Find better deals on supplier/OTA websites
33% | 38%

Want to book products that aren't available through OBT/TMC (e.g., premium economy or boutique hotels)
30% | 38%

Booking tool is not user friendly/easy to use
23% | 25%

Aren't familiar with OBT/TMC or how to use them
18% | 22%

Not enough booking options
12% | 36%

Other
18% | 0%

Q. Thinking about your company, why do you think employees book outside of the OBT? Please select all that apply. **Note: Question only displayed to respondents who indicated employees at their company book through an OBT (n=104).**

Q. You mentioned you commonly use airline/hotel websites or OTA websites to book flights or hotels for business trips. Which of the following are reasons why you do not book using your company's corporate booking tool or corporate travel agency? Please select all that apply. **Note: Question only displayed to respondents who indicated they commonly book flights or hotels through supplier or OTA websites (n=213)**

Note: Response options paraphrased for brevity and to ensure consistency between the two perspectives; wording of response options was slightly different in the two surveys.

Why does leakage occur? Travel managers and business travelers are largely on the same page

The travel manager's perspective: Travel managers think leakage happens for various reasons. The top reasons are:

- Travelers are attending an event/conference and want to book through the event website or book the conference rate (84%)

- Travelers have loyalty status or want to earn loyalty points (43%)

- Travelers find better deals on supplier/OTA websites (33%)

- Travelers want to book products—such as premium economy seats and boutique hotels—that are not available through the OBT/TMC (30%)

A key goal of the study was to examine whether the reasons why travel managers *think* leakage occurs are similar to the reasons why business travelers say they actually book outside of managed corporate channels.

Travel managers and business travelers are largely on the same page: Business travelers who commonly book flights and hotels through supplier websites or OTAs were asked why they do so. The top four reasons they mention are familiar. They are essentially the same reasons why travel managers think leakage occurs. These include:

- I have loyalty status or want to earn loyalty points (50%)

- I am attending an event/conference and want to book through the event website or book the conference rate (41%)

- I find better deals on supplier/OTA websites (38%)

- I want to book products that are not available through the OBT/corporate travel agency (38%)

There are, however, two notable differences. Business travelers (41%) are much less likely than travel managers (84%) to mention booking through an event website/conference rate as one of the reasons why leakage occurs. Similarly, while only 12% of travel managers say leakage occurs because their "TMC/OBT does not have enough options," a much larger number of business travelers (36%) say they book outside of managed channels because "the corporate booking tool/travel agency provided by my company does not have enough options."

Only 1 in 5 travel managers say user experience is a strength of their company's primary OBT

How Do Travel Managers Rate Their OBT's User Experience?

It is a strength — 20%

It is a pain point, and needs a lot of improvement — 14%

It is so-so and needs improvement — 19%

It is decent, but needs some improvement — 47%

Booking

20% of travel managers say the user experience is a strength of their company's primary corporate booking tool. **A larger number (33%)** say it is "so-so" or a "pain point."
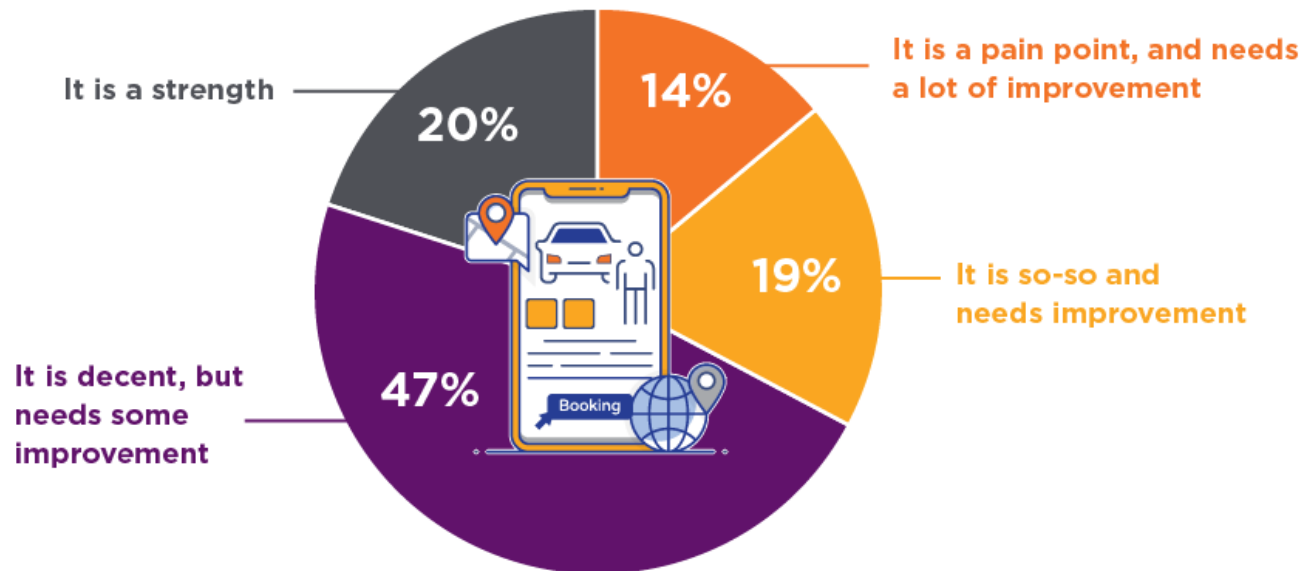
Q. Thinking about the primary corporate online booking tool (OBT) that your company uses, how would you rate the overall user experience? **Note: Question only displayed to respondents who indicated business travelers at their company make bookings through a corporate online booking tool (n=108).**

53

Only one-third of business travelers say their company's OBT is excellent

How Do Business Travelers Rate…?

Legend: ■ It is poor ■ It is below average ■ It is so-so ■ It is pretty good ■ It is excellent

My company's corporate booking tool (e.g., Deem, SAP Concur, TripActions, etc.)*
| 18% | 45% | 32% |
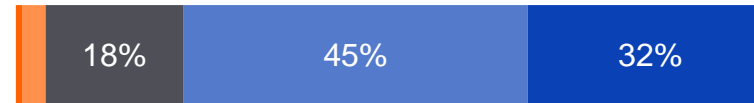
My company's corporate travel agency (e.g., American Express Global Business Travel, CWT, BCD Travel, Egencia, etc.)
| 25% | 46% | 23% |
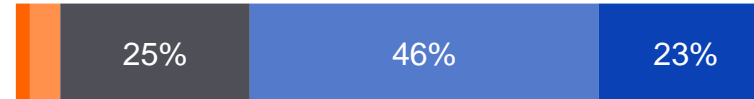
My company's overall travel program
| 22% | 48% | 25% |
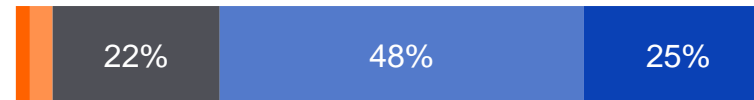
Q. How would you rate…? (n=406)
*Respondents only asked about OBTs if they indicated their "company provides a corporate booking tool (e.g., Deem Etta or SAP Concur Travel that [they] can use to book trips"

How do corporate booking platforms measure up?

Mixed satisfaction: Only 20% of travel managers say the user experience is a strength of their company's primary OBT. Almost half (47%) say the user experience "is decent – but needs improvement." A fairly significant number (32%) say it is "so-so" or a "pain point." Similarly, only one-third of business travelers (32%) say their company's OBT is "excellent." While almost half (45%) say it is "pretty good," more than one in five (22%) say it is "so-so," "below average," or "poor."

54

What Do Travel Managers View as Pain Points of Their Primary Corporate Booking Tool?

up to three answers allowed

%	Pain Point
55%	End-user Traveler Experience
44%	"Richness" of display: descriptions of what different offers includ... such as amenities and cancellation terms; display of traveler revie...
43%	Consistent experience/ options across different devices (e.g., desktop, mobile, etc.)
40%	Content: the amount and quality of booking options available through OBT
34%	Innovation: New features such as personalized recommendations and chat
28%	Integration: Being able to connect our booking tool or booking d... with other systems such as expense management or risk manage...
28%	Configuration: Being able to configure our booking tool to apply policies and promote our preferred vendors
19%	Risk management: display of risk related information such as local COVID-19 infections and airline sanitation policies
14%	Other

Travel managers identify various pain points of their company's primary corporate booking tool.

They were asked to indicate up to three pain points (out of eight possible). They commonly indicate end-user/traveler experience (55%), richness of display (44%), and consistency of experience/options across different devices (43%).

Q. Thinking about the primary OBT that your company uses, which of the following areas would you most want to see it improve? Please select up to three. **Note: Question only displayed to respondents who indicated business travelers at their company make bookings through a corporate online booking tool (n=106).**

55

What Do Business Travelers View as Pain Points of Their Primary Corporate Booking Tool?

up to three answers allowed

%	Pain Point
42%	Content: the amount and quality of booking options available through OBT
42%	My company's booking tool automatically feeds bookings to other systems such as the expense reporting tool
34%	Configuration: My company's ability to configure the tool to apply policies and promote its preferred vendors
31%	"Richness" of display: descriptions of what different offers include such as amenities and cancellation terms; display of traveler reviews
31%	Innovation: New features such as personalized recommendations and chat
27%	Risk management: display of risk related information such as local COVID-19 infections and airline sanitation policies
26%	Allowing flight and hotel upgrades (e.g., premium economy or larger hotel rooms)
20%	Consistent experience/ options across different devices (e.g., desktop, mobile, etc.)
17%	End-user Experience

Business travelers point to pain points with their company's primary corporate booking tool.

Asked to indicate up to three pain points (out of eight possible), they commonly pick content (42%), automatic feeds with other systems such as expense reporting tools (42%), and their company's ability to configure the tool to apply travel policies (34%).

Q. Thinking about the corporate booking tool your company provides you to book travel, which of the following areas would you most want to see it improve? Please select up to three. **Note: Question only displayed if respondents indicated their "company provides a corporate booking tool (e.g., Deem Etta or Concur Travel that [they] can use to book trips" (n=288).**
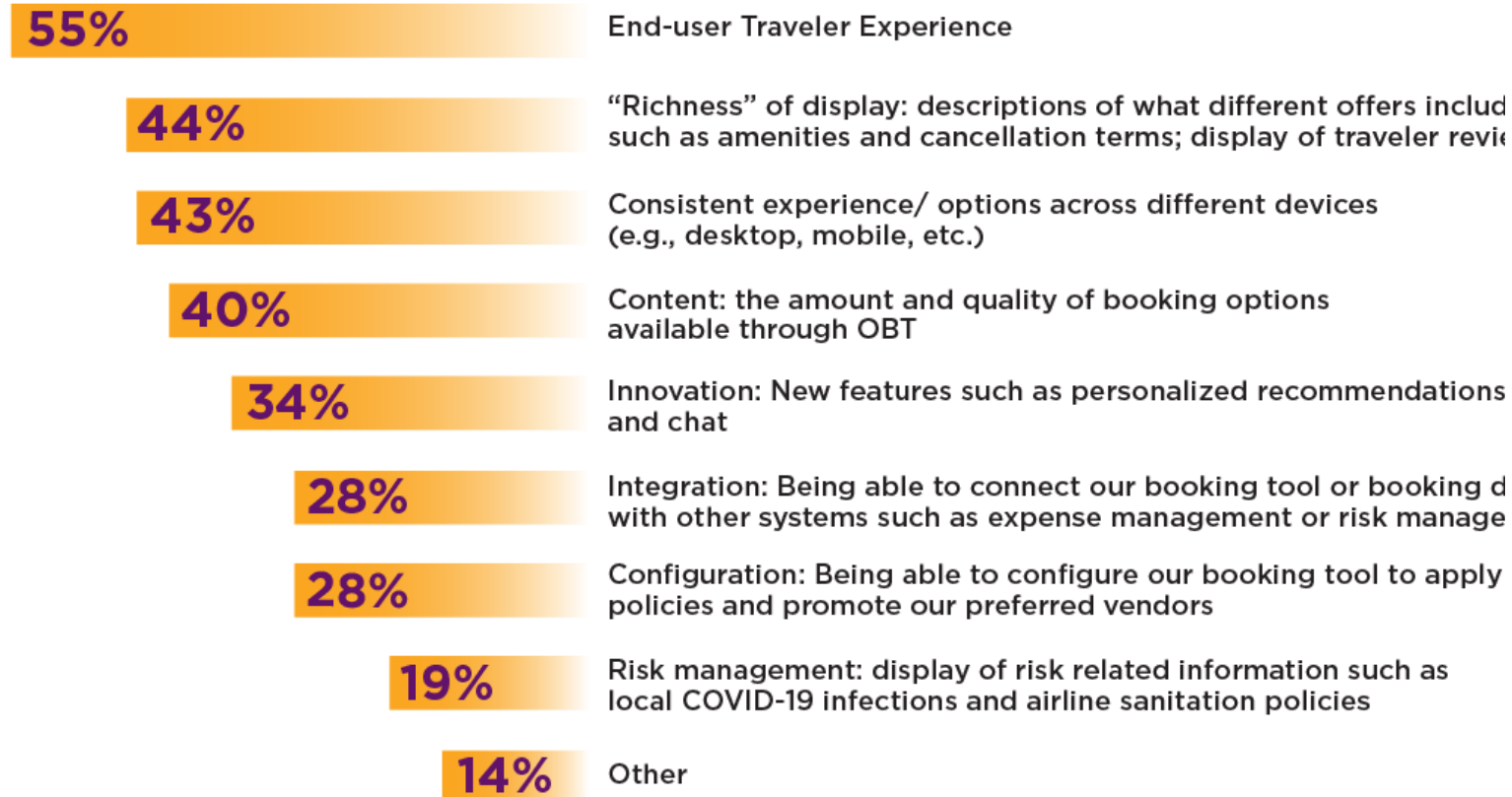
56

What are booking tool pain points?

- **The travel manager's perspective:** Travel managers point to various pain points with their primary OBT. Asked to pick up to three pain points (out of nine possible), they commonly identify the end-user/traveler experience (55%), "richness" of display (44%), a consistent experience across devices (43%), the amount of and quality of booking options available (40%), and innovation (34%).

- **The business traveler's perspective:** Business travelers were also asked to identify up to three pain points with their company's corporate booking tool. Three of the five that they mention most often are also among the five pain points mentioned most often by travel managers. These include the amount of and quality of booking options available, richness of display, and innovation. However, they commonly mention two pain points that travel managers mention less often. These are integration (i.e., company's booking tool automatically feeds bookings to other systems such as expense reporting tool) and configuration (i.e., company's ability to configure booking tool to apply policies and promote its preferred vendors).

Most business travelers prefer to book their own trips

How Do Business Travelers Prefer to Book Work Trips?

It Depends

14%

Agent-Assisted
I would prefer to call a travel agent and have the agent book for me

31%

54%

BOOK NOW

Self-Service
I would prefer to book myself using an online booking tool
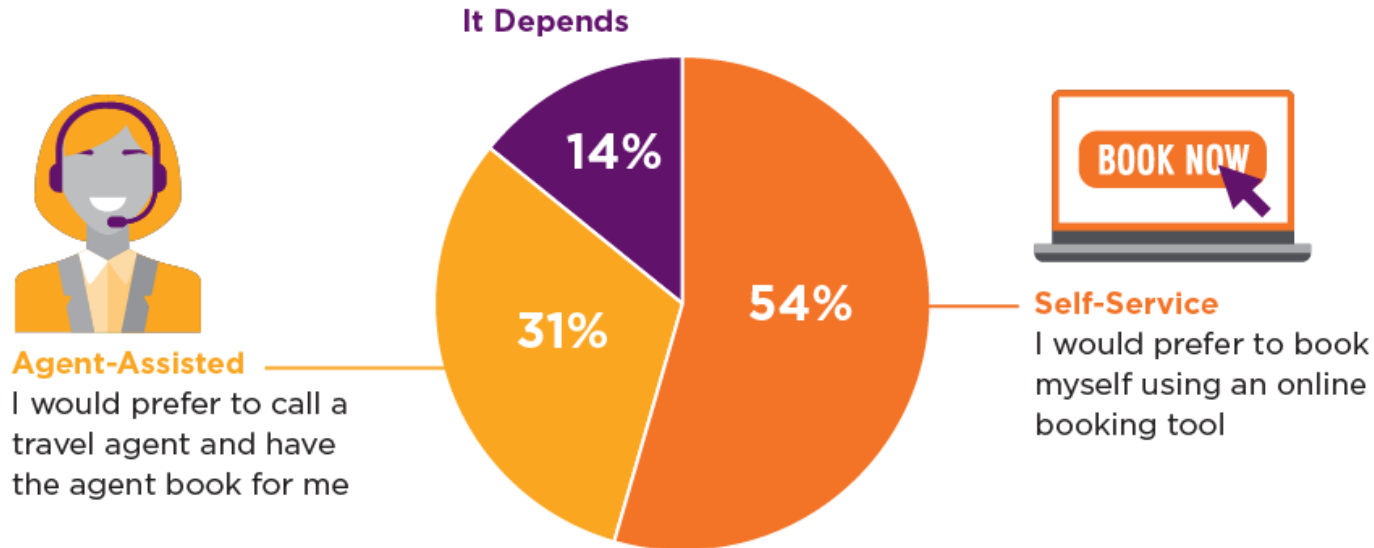
Q. How would you prefer to book business trips? (n=406)

Business travelers prefer to book their own trips.

More than half (54%) would prefer to book themselves using an online booking tool. Almost one-third (31%) would prefer to call a travel agent and have the agent book for them, while one in 10 (14%) say it depends.

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Some business travelers want to book on a desktop computer; others want to book on a mobile device

How Do Business Travelers Prefer to Book *Their Own* Work Trips?
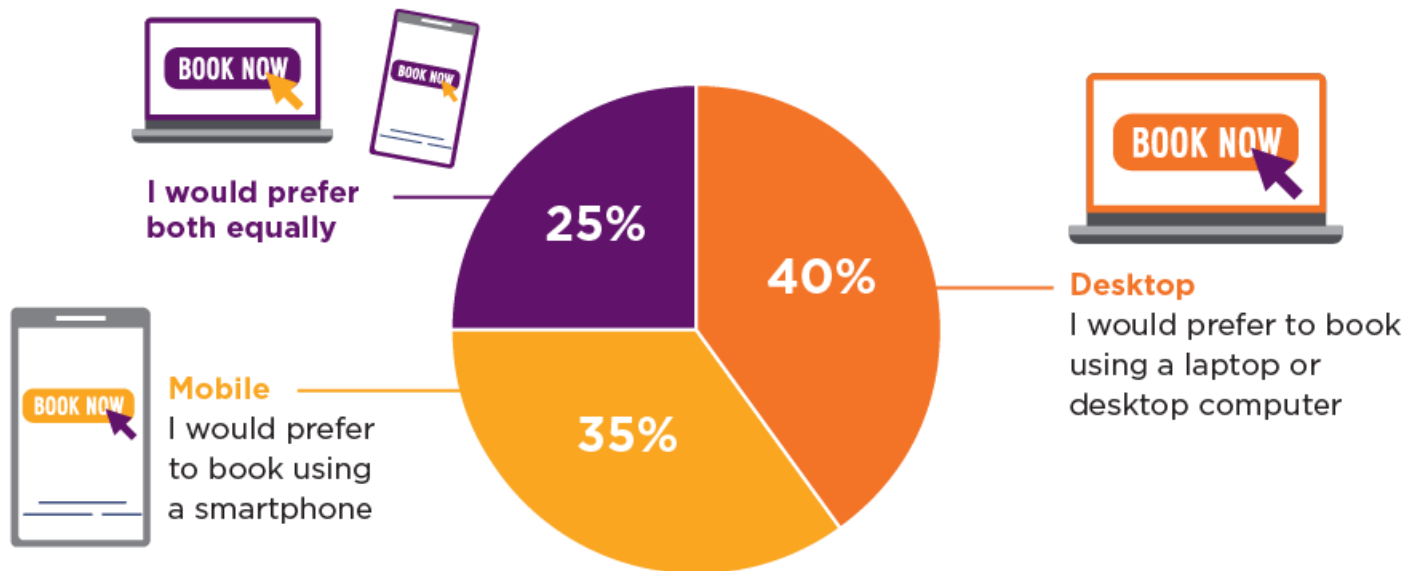
Different business travelers prefer to book in different ways.

Two in five prefer to book on a desktop computer (40%) and a similar number (35%) prefer to book using a smartphone. One-quarter (25%) prefer both equally.

Q. If you were to book your own business trip using a corporate booking tool, which of the following formats would you prefer? (n=406)

Travel managers say accessibility features are important when selecting an OBT

How Important Are Various Features When Selecting a Corporate Online Booking Tool?

■ Not important at all ■ Not important ■ Neither important nor unimportant ■ Important ■ Very important

	% important + very important
General usability: OBT has a simple, intuitive interface and is easy to use — 26% / 74%	**100%**
Automated features: OBT has features--such as automated ticket exchange, trip sharing, and integration with expense tools--which can save travelers time and work — 3% / 34% / 60%	**94%**
Accessible options: OBT highlights accessibility features of travel suppliers such as flights, hotels, and rental cars to make it easier for travelers with accessibility needs to find suitable options — 19% / 49% / 30%	**79%**
Accessible interface: OBT is designed according to accessibility principle--such as the W3C framework--that make it easier for the vision-impaired or people who have trouble typing to use — 4% / 25% / 49% / 21%	**71%**
Personalization: OBT uses artificial intelligence to offer personalized options that meet our traveler needs — 8% / 19% / 54% / 16%	**70%**

Q. Q. Please rate the importance of the following factors when selecting a corporate online booking tool (OBT) (n=85-102).

All travel managers surveyed (100%) say general usability is important when selecting a corporate booking tool. A large majority (94%) say automated features (e.g., automated ticket exchange, trip sharing, and integration with expense tools) are important. At least seven in 10 say accessibility features—including highlighting accessibility features of travel suppliers (79%) and providing an accessible interface (71%)—are important.

Travel managers are interested in corporate booking innovations

Which Booking Innovations Are Travel Managers Most Interested in?
up to three answers allowed

68%
BOOKING RECOMMENDATIONS
An OBT provides employees with trip recommendations based on their itinerary
(i.e., when it makes sense to take public transit vs. rent a car; when it makes sense to fly vs. take a train)

56%
AUTOMATED PROCESSES
An OBT automatically performs tasks for travelers such as flight check-in and seat upgrades

45%
LIVE CHAT
A chat feature in the booking tool allows travelers to communicate with a live agent

42%
PERSONALIZATION
An OBT provides employees with personalized shopping results based on factors such as purchases they have made in the past or traveler profile information

41%
RISK MANAGEMENT INTEGRATION
OBT integrates with risk intelligence platform and displays risk related information *(e.g. COVID-19 infections, local crime statistics, etc.)*

27%
AUTOMATED CHAT
A chatbot connected to the booking tool can message travelers, answer basic questions, and assist with bookings

21%
MULTIPLE MOBILITY OPTIONS
Booking tool allows me to book different types of ground transportation *(i.e., rental cars, rideshare such as Uber or Lyft, etc.)*

Travel managers are interested in corporate booking innovations.

They were asked to pick up to three innovations that they are most interested in. They commonly pick booking recommendations (i.e., when it makes sense to take public transit vs. rent a car; when it makes sense to fly vs. take a train) (68%), automated processes such as flight check-in and seat upgrades (56%), and live chat with an agent (45%).
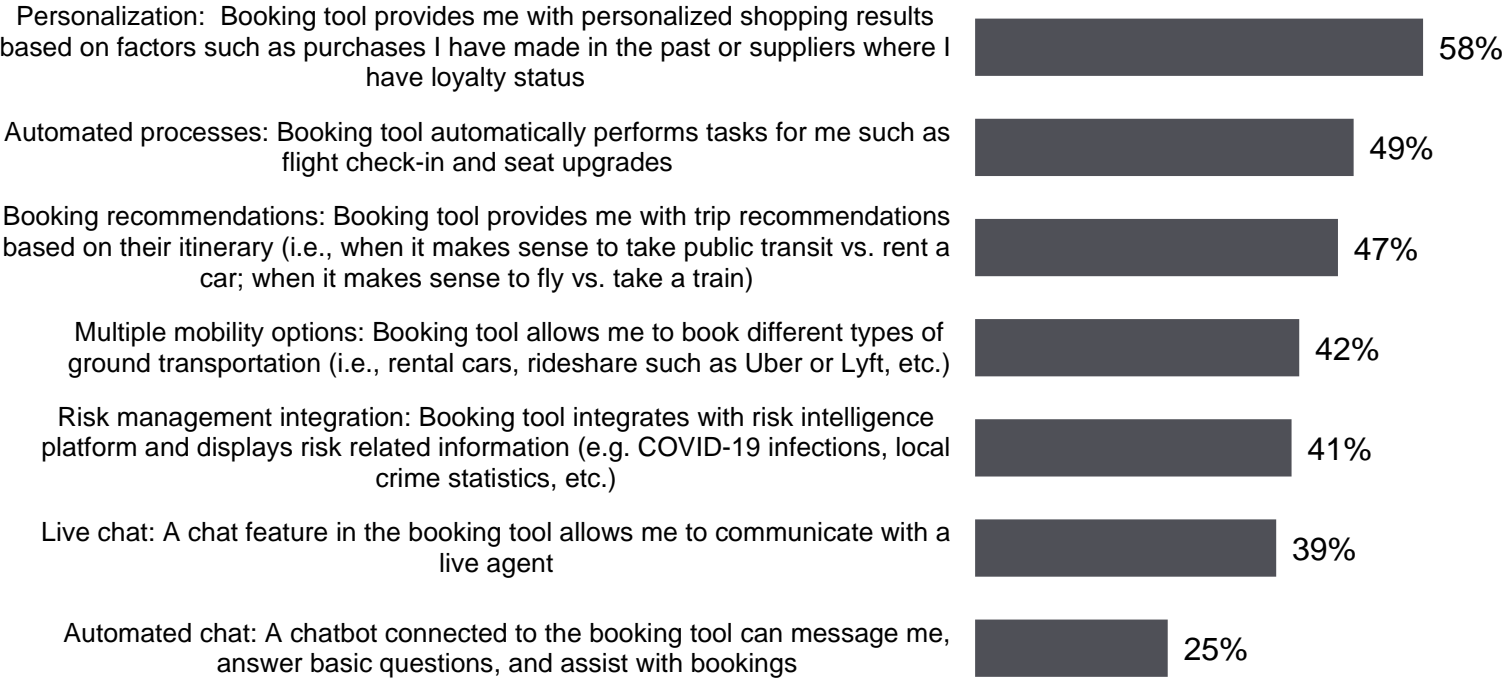
Q. Thinking about corporate booking technology, please rank the following innovations in order of your interest.
Note: Question only displayed to respondents who indicated business travelers at their company make bookings through a corporate online booking tool (n=98).

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Business travelers are interested in corporate booking innovations

Which Booking Innovations Are Business Travelers Most Interested in?
% included in top 3 (out of 7)

Innovation	%
Personalization: Booking tool provides me with personalized shopping results based on factors such as purchases I have made in the past or suppliers where I have loyalty status	58%
Automated processes: Booking tool automatically performs tasks for me such as flight check-in and seat upgrades	49%
Booking recommendations: Booking tool provides me with trip recommendations based on their itinerary (i.e., when it makes sense to take public transit vs. rent a car; when it makes sense to fly vs. take a train)	47%
Multiple mobility options: Booking tool allows me to book different types of ground transportation (i.e., rental cars, rideshare such as Uber or Lyft, etc.)	42%
Risk management integration: Booking tool integrates with risk intelligence platform and displays risk related information (e.g. COVID-19 infections, local crime statistics, etc.)	41%
Live chat: A chat feature in the booking tool allows me to communicate with a live agent	39%
Automated chat: A chatbot connected to the booking tool can message me, answer basic questions, and assist with bookings	25%

Business travelers were asked to rank corporate booking innovations in order of interest.

They commonly include in their top three personalized shopping results based on factors such as purchases they have made in the past or suppliers where they have loyalty status (58%), automated proceses such as flight check-in or seat upgrades (49%), and booking recommendations (i.e., when it makes sense to take public transit vs. rent a car; when it makes sense to fly vs. take a train) (47%).

Q. Thinking about the corporate booking tool that you use to book business trips, please rate your interest in the following innovations. Please drag and drop each option so 1 equals the innovation that interests you most. Note: Question only displayed if respondents indicated their "company provides a corporate booking tool (e.g., Deem Etta or Concur Travel that [they] can use to book trips" (n=288).

Business travelers are interested in corporate booking innovations (cont.)

Are Business Travelers Interested in Booking Innovations?

■ Not interested/Not interested at all   ■ Neither interested nor uninterested   ■ Interested/Very interested

Innovation	Not interested	Neither	Interested
Personalization: Booking tool provides me with personalized shopping results based on factors such as purchases I have made in the past…	8%	15%	78%
Multiple mobility options: Booking tool allows me to book different types of ground transportation (i.e., rental cars, rideshare such as…	8%	14%	78%
Booking recommendations: Booking tool provides me with trip recommendations based on their itinerary (i.e., when it makes…	9%	15%	76%
Automated processes: Booking tool automatically performs tasks for me such as flight check-in and seat upgrades	8%	17%	76%
Risk management integration: Booking tool integrates with risk intelligence platform and displays risk related information (e.g.…	9%	20%	70%
Live chat: A chat feature in the booking tool allows me to communicate with a live agent	14%	20%	67%
Automated chat: A chatbot connected to the booking tool can message me, answer basic questions, and assist with bookings	18%	25%	57%

Q. Thinking about the corporate booking tool that you use to book business trips, please rate your interest in the following innovations. (n=288)

Business travelers are interested in corporate booking innovations including personalized shopping results (78%), their booking tool providing different types of ground transportation options (78%), and their booking tool providing recommendations such as when it makes sense to fly vs. take a train (76%).

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Corporate booking innovations: travel managers and business travelers

Corporate booking tools are viewed as less innovative than consumer websites. In a 2021 GBTA study, more than seven in 10 corporate travel managers (72%) said corporate booking innovation lags consumer booking innovation. Recently, however, there has been a flurry of innovation in the corporate booking space. In the current GBTA-Deem survey, travel managers and business travelers were presented a list of seven different innovations and asked to pick up to three that they are most interested in. When analyzing their responses, several highlights stand out.

- **Personalization:** Some booking tools can personalize shopping results. They can use artificial intelligence to predict which flights, hotels, or rental cars travelers will like the most— based on past bookings, loyalty memberships, or other factors– and display these options higher in the search results. This is the innovation that business travelers value the most. Almost three in five business travelers (58%) include this as one of the three innovations they are most interested in. A decent number of travel managers are also interested in this innovation with two in five (42%) including it as one of their top three innovations of interest.

- **Booking recommendations:** In the future, booking tools will not only personalize travel options. They might also recommend *how* employees should travel. For instance, if an employee is traveling to Houston, the booking tool would recommend renting a car. If she is traveling to New York City or San Francisco, the booking tool would recommend taking public transit and rideshare (e.g., Uber or Lyft) . To come up with these recommendations, the booking tool would likely use an algorithm that accounts for various factors such as expected travel time, cost, and employee or company preference. More than two-thirds of travel managers (68%) include this as one of the three innovations they are most interested in. Almost half of business travelers (47%) also include this as one of their top three innovations of interest.

- **Automated processes:** Booking tools can automate processes. For instance, they can automatically apply unused ticket credits. If a traveler has credits, the booking tool would automatically use these to pay for her travel so she does not need to look up an old confirmation number and apply the credit herself. Booking tools might also automatically check travelers into flights, or automatically upgrade seats. Business travelers and travel managers are both interested in this innovation. Almost half of business travelers (49%) include automated processes as one of the top three innovations they are most interested in. An even higher number (56%) of travel managers include this as one of their top three innovations of interest.

- **Risk management integration:** Booking tools can integrate with risk intelligence platforms to display safety-related information. For instance, they can display COVID-19 infection rates or neighborhood crime rates. A decent number of travel managers (41%) and business travelers (41%) include this as one of the top three innovations they are most interested.

- **Multiple ground transportation options:** Booking tools have focused on offering travelers more choices. For instance, they have added non-GDS hotel properties and rates from consumer-focused platforms such as Booking.com and Expedia. They have also added more flights from low-cost carriers. While OBTs have expanded air and hotel content, they have largely neglected ground transportation. In the last year, this has begun to change. Some OBTs allow travelers to book chauffeured cars and rideshare (e.g., Uber or Lyft) through their platform. While only 21% of travel managers include this as one of their top three innovations of interest, a much larger number of business travelers (42%) do.

Sources: GBTA, *How Do Travel Managers View Corporate Booking Technology?* Alexandria, VA: GBTA, 2021. https://hub.gbta.org/files/3612.
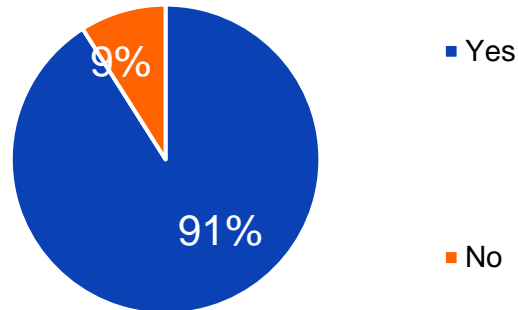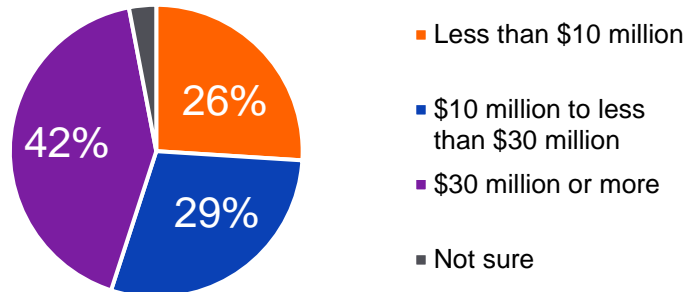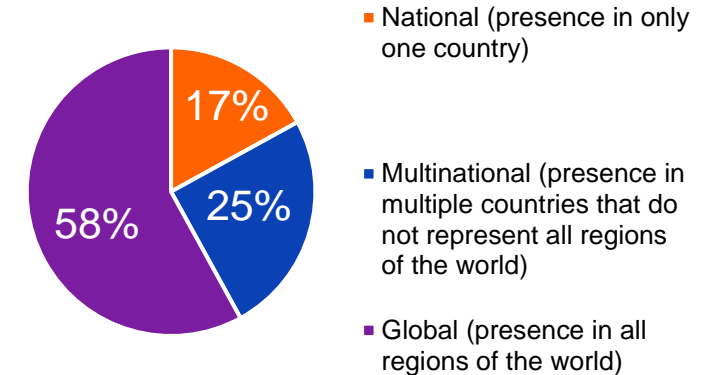
![GBTA logo]

Respondent Profile

Travel Manager's Respondent Profile

Thinking about your company, do business travelers make bookings through a corporate online booking tool (OBT)? (n=139)
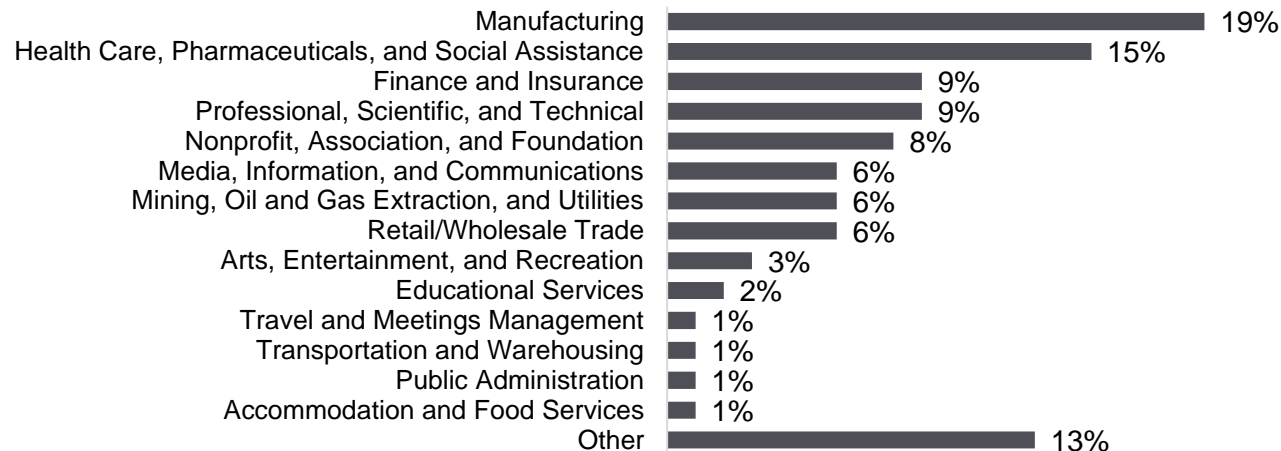
- Yes — 91%
- No — 9%

What was your company's total travel spend in 2019 (before the pandemic) in U.S. dollars (including air, hotel, car rentals, meetings, etc.)? Please use your best estimate. (n=113)

- Less than $10 million — 26%
- $10 million to less than $30 million — 29%
- $30 million or more — 42%
- Not sure

How would you define your company's reach? (n=114)

- National (presence in only one country) — 17%
- Multinational (presence in multiple countries that do not represent all regions of the world) — 25%
- Global (presence in all regions of the world) — 58%

Which of the following industries best describes your organization? (n=113)

Industry	%
Manufacturing	19%
Health Care, Pharmaceuticals, and Social Assistance	15%
Finance and Insurance	9%
Professional, Scientific, and Technical	9%
Nonprofit, Association, and Foundation	8%
Media, Information, and Communications	6%
Mining, Oil and Gas Extraction, and Utilities	6%
Retail/Wholesale Trade	6%
Arts, Entertainment, and Recreation	3%
Educational Services	2%
Travel and Meetings Management	1%
Transportation and Warehousing	1%
Public Administration	1%
Accommodation and Food Services	1%
Other	13%

How many employees does the organization you work for have across all locations? Your best estimate is fine (n=114)

- Less than 1,000 — 10%
- 1,001 to 5,000 — 24%
- More than 5,000 — 67%

Business Traveler's Respondent Profile

By which gender do you identify? (n=406)

- Male (he/him/his)
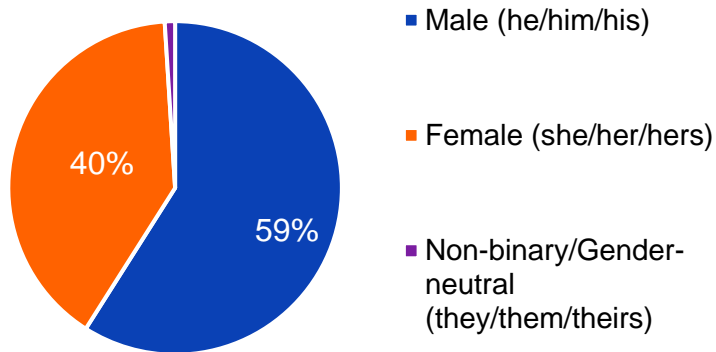- Female (she/her/hers)
- Non-binary/Gender-neutral (they/them/theirs)

59%
40%

Please select the appropriate age category for yourself. (n=406)

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65+

19%
20%
20%
20%
16%
4%

Which of the following best describes your employment status? (n=406)

- Employed full-time
- Employed part-time

95%
5%
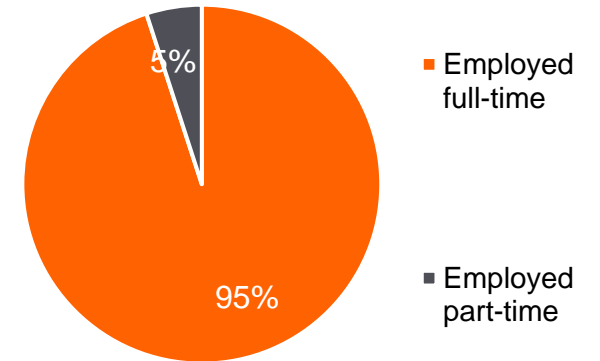
How many overnight business trips have you taken in 2021 and 2022 where you traveled at least 50 miles from your home? Your best estimate is fine (n=406).

- 3 to 5 trips
- 6 to 11 trips
- 12 or more trips

57%
27%
16%
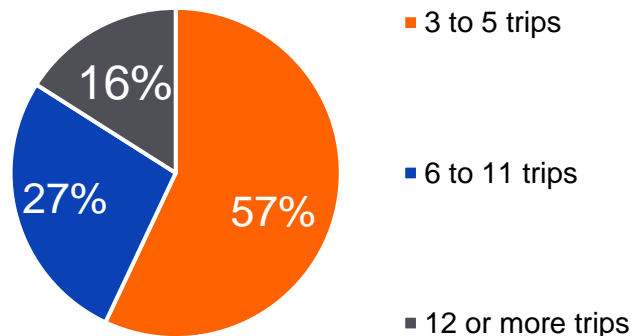
Thinking about traveling for business at your company, do the following apply? (n=406)

- Yes
- No
- Not sure

	Yes	No	Not sure
My company has a corporate travel policy that outlines travel-related rules and processes	89%	8%	3%
My company has a corporate travel manager, travel team, or other staff (e.g., finance or HR) that oversees travel-related processes	81%	16%	3%
My company provides a corporate travel agency I can use to book trips or request assistance	76%	20%	4%
My company provides a corporate booking tool (e.g., Deem Etta or SAP Concur)	71%	24%	5%

Business Traveler's Respondent Profile

Which of the following best describes your position? (n=406)
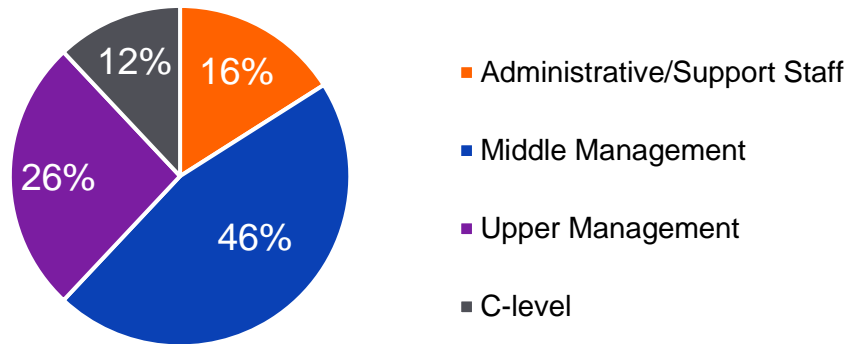
- Administrative/Support Staff — 16%
- Middle Management — 46%
- Upper Management — 26%
- C-level — 12%

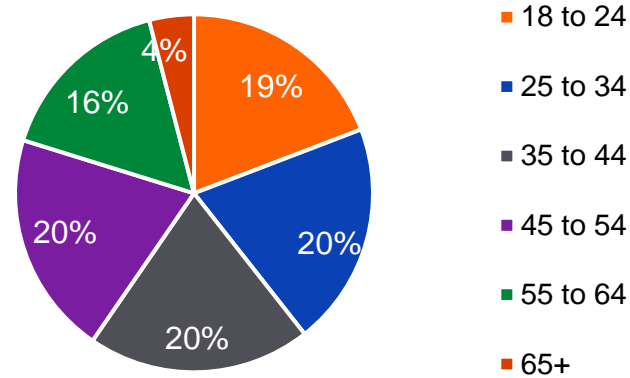## How many employees does the organization you work for have across all locations? Your best estimate is fine. (n=406)

- 1,001 to 5,000 employees — 49%
- More than 5,000 employees — 51%
- Not sure
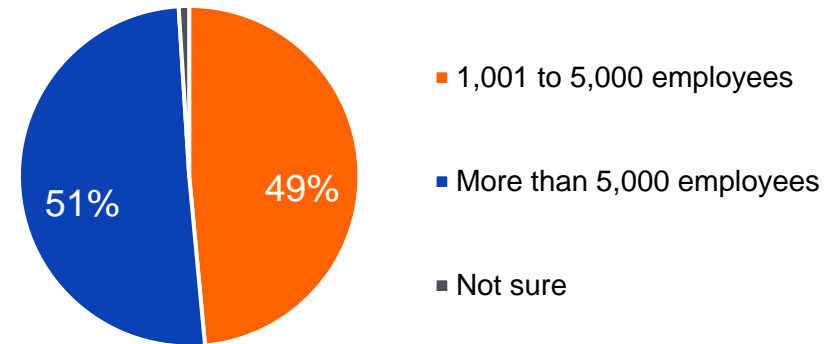
Which of the following industries best describes your role? (n=406)

Role	%
Professional, Scientific, and Technical (e.g., engineering, finance, etc.)	28%
Senior management	24%
Sales/business development	15%
Account management	10%
Consulting	6%
Marketing/event marketing	6%
Other	7%
None of the above	3%

Which of the following industries best describes your organization? (n=406)

Industry	%
Finance & Insurance	16%
Professional, Scientific & Technical	14%
Health Care, Pharma & Social Assistance	13%
Retail/Wholesale Trade	11%
Manufacturing	10%
Transportation & Warehousing	5%
Media, Info & Communications	4%
Travel & Meetings Management	3%
Mining, Oil & Gas Extraction & Utilities	3%
Educational Services	3%
Public Administration	2%
Accommodation and Food Services	2%
Nonprofit, Association & Foundation	1%
Arts, Entertainment, and Recreation	1%
Other	10%