

BTN

BUSINESS TRAVEL NEWS

November 8, 2021

THE PANDEMIC-ERA BUSINESS TRAVELER

Emerging from a pandemic-induced travel hiatus, employees have different expectations of their workplaces and corporate programs. Complexity is high, and a people-first approach will be a priority.

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Yet during these tumultuous times, I have been encouraged by the dedication, resiliency, and heart exemplified by all of you and throughout our industry. Together we've built new partnerships, grown from feedback shared, and shown the grit needed to bring business back better than ever.

While business travel took a pause, the Southwest Business Team put our heads down and worked to reduce friction and improve our product offering. As a direct result of your feedback, Southwest is now at a standard level of participation with Travelport, Amadeus, and Sabre GDS providers, and travelers can now book SWABIZ[®] reservations through their mobile web browser. In addition to distribution changes, we've grown our network and anchored on flexible policies for our Customers. For more details on all Southwest Business offerings, please see Page 9 in this issue.

You spoke, we listened, and we delivered. It's all of you that inspire us to keep improving the Customer Experience for business travelers and industry partners. We will continue to listen to your feedback, invest in our business products, and earn our place as your trusted travel partner through today's challenges and as we embark on the next 50 years.

Enjoy this issue,

Dave Harvey
Vice President of Southwest Business
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Dear Corporate Travel Professional,

As the pandemic dust settles and businesses move from triage back to travel, the need for a future-proof travel and spend solution has never been clearer. That means finding a forward-thinking partner, like TripActions, who works closely to understand your needs and can deliver on

the promise with a personalized platform—and then innovate as your needs inevitably evolve.

This personalized approach begins with a user-friendly booking process featuring the deep inventory travelers demand. That has a cascading effect: The experience, which travelers have become accustomed to with consumer tools, leads to a higher traveler satisfaction score and platform adoption. And that results in a higher level of policy adherence and duty of care, as well as cost savings.

Of course, this singular experience must continue in-trip, through features like easy cancellation or rebooking right from the app, personalized support in local languages if travelers need assistance, and automatic expense submission based on a traveler's particular policy.

TripActions is leading the industry because we recognize the power that personalization brings to every travel program—whether restarting, upleveling, or both. Putting that power to work for you is something to keep in mind as you enjoy this illuminating issue from BTN.

Meagen Eisenberg
CMO
TripActions

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Understanding the Pandemic-Era Business Traveler

Employees have more influence than ever over workplace policies and programs. How will travel managers balance the new dynamic—and what tools and strategies will engage travelers?

The Covid-19 pandemic has baked more scrutiny but also more purpose into the decision to travel for business. The shift to remote work, which catapulted brick-and-mortar offices into the future in a too-quick-for-comfort scramble, has now become the preferred environment for a majority of the knowledge-based workforce, according to professional network Blind. Most only want to visit the office intermittently to power up their work relationships and dive deeper into collaboration projects. According to EY, only 20 percent have interest in returning to the office full time. Indeed, no matter where you look, worker surveys show overwhelming preferences for flexible work arrangements and employees demanding to work more on their own terms.

The focus on how we work and not where we work has enveloped business travel as well. Is it necessary to travel to meet that client? Is there a return on investment for that conference or trade show? Can in-person training now be reasonably achieved through video-enabled online learning? On the flip side, however, do we need to enable more internal meetings so our now-geographically-distributed workforce can come together to engage with and understand our unique corporate culture?

All these questions put a laser focus on the fact that travel in the context of business is a means to an end—a tool or an enabler that allows businesses to get the job done. Now, however, the decision to hop on a plane may not be as straightforward. There are viable alternatives available at our fingertips and plenty of reasons to stay put: traveler health concerns, productivity, sustainability, work-life balance, mental well-being. They all play a part in the decision-making process, and in many cases are deeply personal to the employee. So how does this affect travel management?

WHAT TRAVELERS WANT

Before we look at what employee travelers want, let's look at what they have: power.

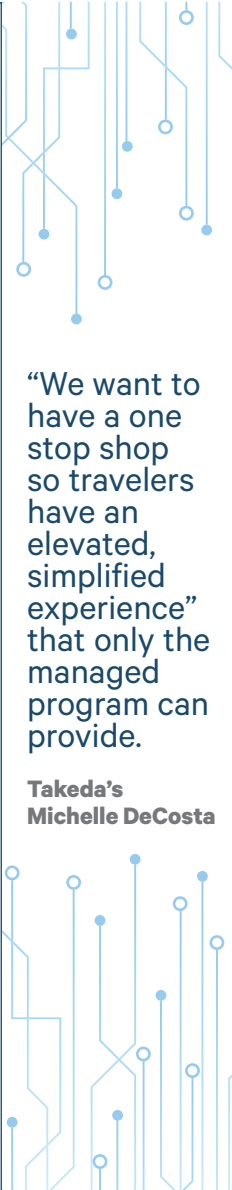
EY's 2021 Work Reimagined survey showed that 54 percent of workers would quit their jobs if the company was not flexible in meeting their personal or work-life needs. Caught in a lingering pandemic environment and swept into a social-industrial phenomenon recently dubbed "The Great Resignation," companies have shown more deference to worker preferences and needs, and travel programs are no exception.

"Traveler preferences have definitely taken precedence over compliance with our preferred suppliers," said Yukari Tortorich, global

travel VP for Discovery, where employees have returned to some levels of travel and travel requests are increasing on the daily. Speaking on a panel at the BTN Group's recent Innovate conference in New York, the veteran travel manager said she was considering ways to ease travelers back into the idea of stricter supplier compliance as travel returns in earnest for the mass media company. For now, travelers still have latitude to book with suppliers that meet sometimes intangible personal preferences.

Tortorich isn't alone in this challenge to re-establish a more traditional travel guidance for Discovery's program. In a June 2021 SAP Concur survey of travel managers, 99 percent of 700 respondents said their jobs would be harder over the next 12 months. Not only are they grappling with communicating revised travel policies and dealing with new border regulations and health concerns, they also will be faced with changing traveler expectations of what corporate travel programs should provide.

A June SAP Concur survey of more than 3,000 business travelers found the vast majority—72 percent—of managed business travelers expected their travel programs now to offer them flexibility to choose alternative airlines, hotels and transportation providers to fit



"We want to have a one stop shop so travelers have an elevated, simplified experience" that only the managed program can provide.

**Takeda's
Michelle DeCosta**

their needs. For significant percentages of respondents, that meant the latitude to book direct flights (52 percent), four- and five-star hotels (39 percent) or premium cabin seating on airlines (also 39 percent).

In a more recent Concur survey of 1,070 corporate travelers conducted in October, the top three concerns when booking travel were Covid-19 infection rates in the target destination, Covid-19 vaccination rates in the target destination and how eco-friendly travelers could make their trip. This survey also revealed that trip cost was business travelers' second-to-last priority in traveling post-pandemic.

Aligning with those expectations would be a topsy-turvy reversal of recent objectives for most travel managers, who have been rewarded for at least the last decade for being highly procurement oriented and for their ability to deliver year-over-year savings. Judging from recent comments from the likes of Tortorich and other big travel buyers, however, trip cost can no longer be the determinate factor when booking business travel.

"The biggest challenge and the biggest change in this environment has been... less of a focus on how much does the trip cost and more of a focus on, is the travel safe, is there an ROI?" ServiceNow travel manager Heather Allegrina said during a recent Concur Fusion panel.

But other traveler preferences like sustainability, booking with diverse suppliers and getting choosier about types of transport or class of service choices aren't out of the picture.

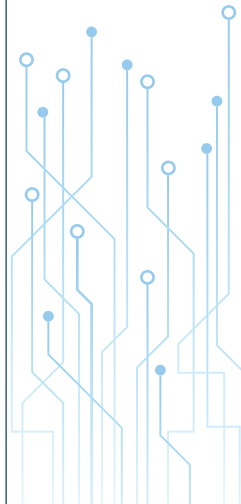
BALANCING POLICY & TRAVELER PREFERENCE

BTN's Corporate Travel 100 research revealed policy trends among some of the industry's most sophisticated travel programs. A preference for direct flights, despite higher costs, has been one point of change for many programs, given the motivation to reduce travel



"The biggest challenge and the biggest change in this environment has been... less of a focus on how much does the trip cost and more of a focus on, is the travel safe, is there an ROI?"

**ServiceNow's
Heather
Allegrina**



touchpoints and health exposures for the traveler. Direct flights also mitigate the intensive carbon emissions of participating in a second plane take-off. Other policy changes travel managers have shared with BTN surround the number of hours travelers may spend reaching a business travel destination via rental car or personal car. The duration of acceptable vehicle journey time has increased for people who prefer to drive rather than fly—and car rental providers' revenues are loving it.

BTN's 2021 hotel survey revealed 35 percent of travel managers have seen a shift in hotel bookings toward upscale properties since 2019 and 31 percent have seen a shift to upper-upscale properties—whether their policies technically allow for it or not.

A number of CT100 companies have either considered or already implemented more permissive travel policies around premium air cabins. One travel manager, on condition of anonymity, revealed he was considering an all-business class air policy. On the one hand, he said, the move would address traveler expectations in terms of perceptions of service and duty of care; on the other hand, and more strategically, he believes it would motivate every would-be traveler and direct manager to scrutinize the value and ROI of each trip against the budget impact. "I don't know if we could do it," he said, "but I'm starting to think it might be a good idea."

Moving forward, this is the kind of strategic balancing act travel managers will need to play as employees get back on the road in a tight labor market, where employees preference has more influence than ever.

SAP Concur, for one, is so convinced companies will double down on employee experience—in all matters, including travel and expense—that the T&E technology giant has rolled out a sentiment analysis platform in collaboration with Qualtrics to measure traveler

reaction at scale and support data-based decision-making around how T&E policy and program changes affect employees.

"People are a company's greatest asset, and it's no secret that retaining employees has become even more critical," said SAP Concur solution area lead Mike Koetting, "A company's travel and expense programs can directly impact an employee's experience."

GO DEEPER THAN POLICY TO GAIN TRAVELER TRUST

T&E policy adjustments aren't the only response to meeting travelers' post-Covid expectations—even if they seem like the most straightforward. Looking more deeply into traveler motivations for flexibility and increased service levels, some travel managers are asking themselves what travelers are really seeking.

The most succinct answer may be "trust" or "support" or "a sense of control" over their journey. Simply changing a company's rules around class of service or preferred suppliers may fall short on that count.

Takeda Pharmaceutical global head of travel Michelle DeCosta is taking a different approach to transform the business travel experience for her travelers. "It's all about visibility—and making sure support teams are constantly visible to travelers," she said.

To that end, DeCosta has enlisted the help of mobile travel technology platform Roadmap to offer information, access and a sense of control for travelers as they get back on the road en masse. While Takeda continued to travel at reduced volumes through the pandemic, by summer it was up to about 20 percent of its 2019 total and it continues to scale, though DeCosta predicts the company won't go back to pre-pandemic travel levels.

Even at these lower numbers, Takeda travelers were challenged by border entry requirements, different cultural acceptance for

THE PERSONALIZATION PUZZLE IN A PANDEMIC-CHANGED ENVIRONMENT

IT'S TIME TO RETHINK BOTH THE BREADTH AND THE DEPTH OF TRAVEL MANAGEMENT TO ACHIEVE A PEOPLE-FIRST PROGRAM.

Tailoring business travel to personal needs wasn't born with the pandemic, but issues that have emerged from its impact introduce new concerns into the travel management picture. "We've begun conversations internally with our top stakeholders on tools and methods to help focus on people, the planet and personal well-being and bring this into the overall equation along with cost on the decision to travel," said Takeda Pharmaceuticals travel and meetings lead Michelle DeCosta.

Diverse, Equitable and Inclusive Travel Programs – More companies are looking at diversity and inclusion within their travel programs, and whether preferred suppliers reflect the corporate's current community of diverse travelers—in terms of gender, racial background, LGBTQ+ status and mental and physical differences, including health and chronic disease. These types of efforts have become more critical for corporates since Covid-19 ushered in movements like Black Lives Matter that have raised awareness around social justice issues, but also more generally shined a light on the social impact of corporate practices. Ensuring respect for and common identity with diverse travelers within travel program policies and among the travel supplier set has been a growing concern for travel managers and one that speaks to the stronger 'people-first' trend in managed travel programs.

Personas & Policies – While it's one strategy to offer broad inclusion, it's also important to understand the individual traveler. Emerging from a pandemic, employee roles, like sales, may be ready to hop on planes as quickly as they can. Their companies may have different ideas. "We may have fewer road warriors," said EAB VP of business solutions Steven Mandelbaum, speaking about his own company, but potentially also predicting broader trends. "But I think there will be more infrequent business travelers to manage."

Those changes could impact how travel managers look at policy, and also what services they need to provide to travelers. Infrequent travelers may require stronger guidance and policies to support decision-making. Having fewer road warriors could translate into less detailed data about their buying patterns and histories—and could make true personalization efforts more challenging. That said, the effort to offer more tailored and predictive itineraries will press on. For many companies, however, it may require set ups that include larger tranches of data than their own travelers produce.

In that case, travel management companies may be well positioned to develop personas and persona-based trip recommendations based on their larger data volumes.

Content Concerns – Fragmented content continues to be a concern, but more TMCs are aggregating multiple sources outside the traditional global distribution systems. That has been a goal of the 'next-generation' TMCs like investor-darling TripActions and the freshly minted, tech-first Spotnana. But it's not limited to the new players. Expedia's recent deal with American Express Global Business Travel is one big example. The online travel giant will provide its immense hotel content to the TMC as part of the deal that sold Expedia's corporate travel division Egencia to GBT.

Hotel content isn't the only focus for travel managers and intermediaries. Increasingly, airlines are slicing inventory and branded fares out of the traditional GDS and only making them available through New Distribution Capability channels. Accessing that content will be important to provide travelers with all the choices available—along with the amenities they require, which aren't baked into the TMC options as consistently as travelers would expect. As TMCs access more NDC content, however, corporates should be able to negotiate and deliver tailor service bundles for their travelers—at least that is among the NDC's many goals. If travel managers begin to personalize programs by traveler type (see personas, above), tailoring different service and amenity bundles for traveler types could be on the horizon.

Technology Transformation – Advanced technology and its ability to crunch vast quantities of data and bridge that data between diverse systems is the path to personalization on a larger scale. Some travel managers are looking to architect their own technology platforms, working with open systems that would allow them to assemble the capabilities and features they want, from profile systems to booking tools and a number of service providers linked into the universe via open application programming interfaces. In this universe, the TMC would become one of many partners but still serve a central role. It's an emerging practice for travel management, but one that has gained momentum with some big investments in new players that are serving this vision. As business travel ramps back up, travel managers may see they have more options than ever to customize their ecosystems with a people-first approach.

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Quality Communication

Finally, we heard your request for more access to the Southwest Executive Leaders and real-time information, which spurred the introduction of our virtual Southwest Business Town Halls and Office Hour series. As business travel returns this fall, we are thrilled to meet face-to-face once again. We will continue using virtual events to reach the masses and give you direct access to Southwest Leadership.

Despite more than a year of so much uncertainty, we have reached significant milestones and stayed true to the investments we know will make a difference in your Southwest Customer Experience. We are proud to have weathered this storm, and proud of our internal Teams who made these changes come to life. Thank you for your partnership, your trust in our vision, and your business with Southwest as we begin the next chapter.

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masking and precautions and the general alterations of business travel during the Covid-era.

“Our suppliers have been doing a lot of handholding [for our business travelers]. As travel ramps up, they won’t be able to do that, at least not to that degree,” DeCosta said, noting that Takeda travelers have voiced huge accolades for the company’s travel partners stepping up during Covid-19.

DeCosta believes companies need to take over more of that confidence-building responsibility themselves by reducing trip friction points and staying present with travelers throughout the journey. “We want to have a one stop shop so travelers have an elevated, simplified experience” that only the managed program can provide, she said.

“The Roadmap app for us is designed to be more than itinerary management,” said DeCosta, referring to platforms that send reminders about in-trip events like flight times, estimated travel time duration and meeting times and locations. Roadmap can do all that, but it functions for Takeda as an app integrator that holds booking apps, supplier apps, government-required apps and also points travelers to updated external resources for detailed information like country entrance requirements that are likely to remain tricky as international travel rates increase.

“We want to take all that intelligence and either integrate it into this app or [allow the traveler] to push a button to get to our global security operations center [for] support,” or to whatever resource they need, DeCosta said.

BUILDING A PATH BACK TO PERSONALIZATION

Understanding the traveler at the point of booking or when situations arise along the journey has been an aspirational objective for travel management for a long time. Travel managers traditionally relied on agents in both circumstances

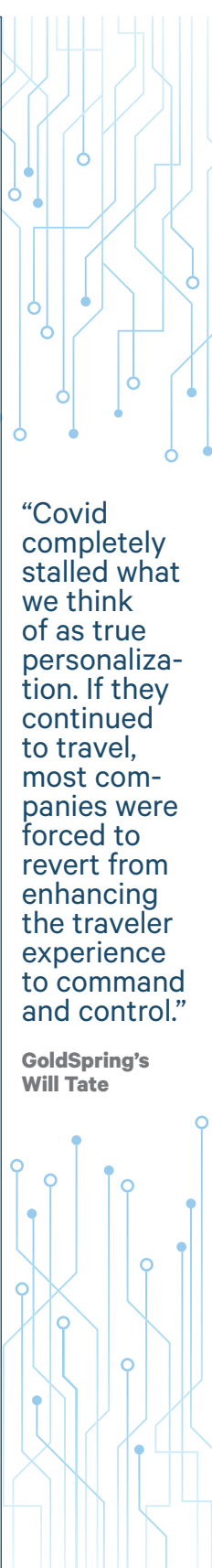
to support traveler decision-making and provide solutions. In the age of Amazon and Netflix, however, when machine learning and artificial intelligence has permeated so many parts of our collective consumer life, business travelers have come to expect the same functionality in employee systems, including travel platforms.

Managed travel has seen progress with travel booking systems—both new and not-so-new—crunching data and applying algorithms to offer tailored travel itineraries based on historical bookings and the bookings of other similar travelers. This “persona-based” technology—and even travel policies tailored to different traveler personas within a company—was a concept that was gaining real traction for managed travel before the great shutdown in 2020. But while Netflix and Amazon data went through the roof as would-be business travelers stayed home ordering groceries and binge-watching their favorite shows, travel data evaporated into thin air.

Microsoft global travel lead Eric Bailey, who pioneered a travel program around traveler personas, told BTN last month, not much of that data is relevant now.

“Everyone has changed, the whole world has changed,” he said. And systems like machine learning that rely on vast data tranches must start over with new post-pandemic data. That strategy could take a while to emerge if business travel ramps up gradually. At its foundation, we all know AI is a volume play. That’s the reason the machine learning players pivoted to business travel in the first place.

GoldSpring Consulting partner Will Tate agreed with Bailey’s assessment but went further. “Covid completely stalled what we think of as true personalization. If they continued to travel, most companies were forced to revert from enhancing the traveler experience to command and control, with pre-trip approval, reuse of unused tickets and hopefully failsafe measures for health and safety,” he said.



“Covid completely stalled what we think of as true personalization. If they continued to travel, most companies were forced to revert from enhancing the traveler experience to command and control.”

GoldSpring’s Will Tate

It’s clear, however, that personalization will be an important part of serving newly empowered travel populations looking for enhanced program features. The question is—how?

Thankfully, innovation didn’t stop during the pandemic. Technology will remain a central player, but new strategies may rely less on a traveler’s historic patterns and more on what we know is happening around them en route or in the destination market.

U.K.-based TMC Gray Dawes is using Grapevine’s AI technology to help deliver personalized travel options for travelers using its YourTrip OBT. This can include hotel, car hire and other traditional ancillaries but will eventually encompass other areas such as restaurant and live event bookings.

Steve Fisher, Gray Dawes’ chief technology officer, says: “Client data is ingested from multiple sources, including historical bookings, live trip information and company policies to get a clear understanding of each traveler and how we can help.”

Bishop says the aim is to make sure offers are contextual, delivered at the right time and in an appropriate channel. Machine learning is vital here to undertake processes at scale and more importantly, to offer these consistently. “If we can anticipate what a traveler wants, deliver it at the right time and make the booking process super simple, then we’ve done what we set out: more margin to the TMC and more value to the traveler and corporate.”

DeCosta said the industry is more willing to collaborate than ever on these kinds of innovations. “[We’re] in discussions with a number of key suppliers to personalize and potentially message around the choices travelers make,” she said. Roadmap already has added personalized sustainability-related messaging to Takeda’s version of the app, and DeCosta noted that other travel partners are eager to align with these types of personalization initiatives to drive traveler engagement.

—Mark Frary and Adam Perrotta contributed reporting to this article

TripActions

What Makes Great Travel & Expense Technology?

No question—the days of basic business travel are over. Today's corporate travel and spend solutions need to be streamlined into all-in-one offerings that create simplicity and efficiency. And they absolutely need to be personalized. That user-centric experience has always been part of the TripActions mission, and we're constantly evolving our product with the end user top of mind. Here's what that means for you.

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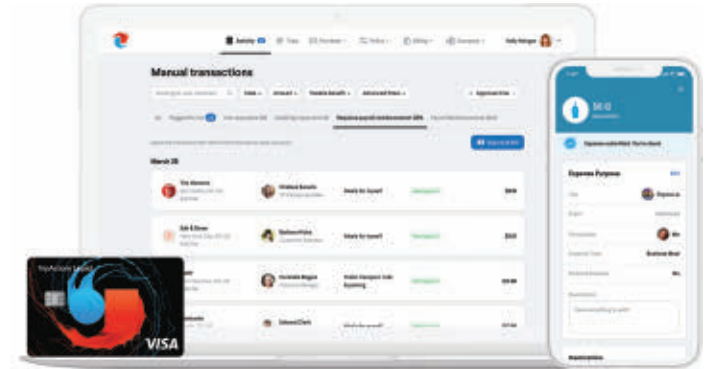
A product isn't worth much if no one uses it. Yet it's common for travel and spend platforms to be ignored: A significant number of corporate travelers book out of policy or off the platform altogether. One of the reasons? Consumer tools are simply easier to use than some of their corporate counterparts. It's why TripActions has focused our efforts around the end user—to make our entire platform as intuitive to navigate as possible.

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See how you can put it to work for you at tripactions.com.

Using Profile to Advance Personalization

Personalization for business travelers is a vision heavily promoted but rarely realized. With increased need to understand travelers and simplify trips in a pandemic environment, could advanced profile management technology finally deliver? Maybe.

In the pre-digital world, a profile was, and still is, an unstructured block of text that travel management companies retain within their global distribution system. The text amounts to a repository of repeatedly used details about the traveler to make the booking process faster, such as payment card numbers, frequent flyer IDs and passport information. On top is a policy layer, outlining, for example, the cabin in which the traveler is allowed to fly.

THE ROAD AHEAD OR A CUL-DE-SAC?

A new generation of digital profile management systems can potentially absorb much more information to understand travelers based on their previous booking (and even search) behavior and a detailed, structured record of their preferences.

Where opinion starts to diverge is on the merit of such an idea. Enthusiasts paint a picture of technology staying one step ahead of travelers to anticipate their needs and keep them happy, safe and compliant throughout the pre-trip and on-trip process. Sceptics see little relevance to business (as opposed to leisure) travel and cast doubt on whether profile-driven personalization will ever materialize in practice.

“For business travel I don’t think anyone really cares whether or not the business traveler likes long walks on the beach or prefers red wine or white,” said David Wood, CEO of Trondent Development Corp, a vendor of GDS-independent profile management systems to TMCs. “Those

are things you care more about on a consumer-based trip where you are planning a nice vacation for somebody. For a business trip, you only want some degree of personalization, like I want a king-sized bed and an economy car and a no-smoking room and an aisle.’ Those types of things are pretty standard.

“TMC call centers just want to get people off the phone as quickly as they can so they can go on to the next one and they’re not going to ask about any of the touchy-feely stuff,” said Wood.

Others see more potential, including Katharina Navarro, global category manager for travel and meetings at Capgemini. She entertains a vision of artificial intelligence “that augments elements in your profile so that it starts to understand you go to Paris every week where you always like to stay in this one hotel. It learns as it goes and combines the profile of what you like with the policy of what you should be booking to give a perfect match.”

According to Will Pinnell, vice president, product for BCD Travel, this is starting to happen. “Newer technology is no longer relegated to the traditional and static fields that are prepopulated in a reservation system or sent from an HR feed by the corporation,” he said. “These new profile systems increasingly contain personal information, including Facebook, Twitter or Instagram handles. Tying multiple systems together is the signature of next-generation profile systems.

“These new profiles learn based on a traveler’s behavior and over time can create personas of individuals based on a set of collective attributes or be-

havior. Personas could include airline or hotel loyalist, road warrior, upgrade investigator, service-often-required, new to the company, and so on.”

WHAT PROFILE-DRIVEN PERSONALIZED LOOKS LIKE

David Chappell, UK country director for the travel technology provider Midoco, imagines perfect personalization of a London-New York journey. The traveler is guided by a mobile app that is powered by a profile management system connected via application programming interfaces to numerous other information sources and service tools.

The process starts with a traveler booking a flight online and then being messaged a week later to ask them, since they haven’t yet booked a hotel, if they would like a reservation to be made at the same property they stayed in last time.

On the morning of the outbound flight, the system checks Google to assess traffic between the traveler’s home address and airport. “If it’s busy, I can send a message to say ‘you might consider a different route,’ or even better, if the app is geolocated, I can see the they are still at home and that traffic means they are going to be late, so I can send a message to say, ‘You really need to think about getting on your way, otherwise we might need to change your flight; would you like us to do that for you if you are delayed?’” said Chappell.

At Heathrow airport, an API connection from flight-tracking service FlightGlobal informs the traveller

“These new profiles learn based on a traveler’s behavior and over time can create personas of individuals based on a set of collective attributes or behavior.”

BCD Travel’s
Will Pinnell

their flight has been delayed. The app knows that last time this happened, the traveler bought time at a departure lounge, so they are pinged a message offering the opportunity to book lounge space again for £30.

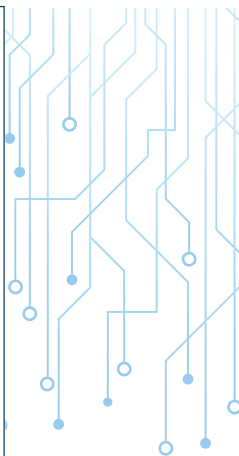
On landing at Kennedy, the traveler is alerted that their taxi has been rebooked and the hotel informed of their late arrival. On arrival at the hotel, another message reminds the traveler they must show their virtual card number on which everything will be paid. Meanwhile, the app has already connected through an API to the traveler's Facebook profile which reveals they like fish restaurants. A message is sent offering to book a famous fish restaurant around the corner from the hotel. "Also, we tell them one of their colleagues is in New York, because we have their profile as well," said Chappell. "We ask 'Would you like to go to dinner together?'"

COULD, AND SHOULD, BUSINESS TRAVEL BE "AMAZONIZED"

"Every single piece of that technology I've just described exists today," said Chappell. "However, no one has hooked it all together. There are people who offer bits of it. The logical concepts behind that and the ability to remove the false positives [that would create irrelevant alerts] from all the triggers would be insanely complex.

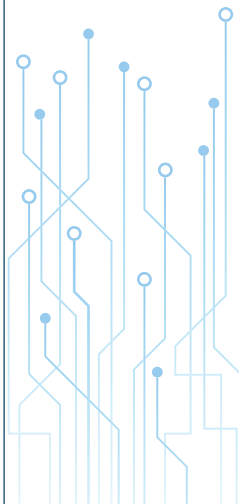
"I think we are many years from that kind of journey," Chappell continued. "However, large aggregators like Amazon are getting pretty good at offering just relevant stuff. Jeff Bezos' single biggest breakthrough was to see just how predictable people are based on data, so I think in time that kind of environment will come."

But it is precisely the comparison with Amazon that places Guy Snelgar, senior vice president for global travel technology integration with Partnership Travel Consulting, in the sceptics' camp on this issue. "We have been talking about personalization for 10 years," he said. "I have not seen anyone usefully apply that, and not just in travel. I bought a Disney Princess play



"Saying 'this is where you stayed when you went to New York last time' may sound like a really simple concept but in a lot of TMCs that's quite tricky, [but] a lot of people are striving to make it happen."

Midoco's David Chappell



castle on Amazon for my niece four years ago and every month Amazon still sends similar product recommendations to me. If Amazon can't do it very well, I'm not sure that expecting companies that service business travelers to do it is realistic."

Snelgar said basic profile-driven personalization, for example to display details of past choices when booking repeat visits to a destination, does have value. "A digital version could add to that, but we've plateaued out," he said. "There's still work to be done to make the most of what's already there."

Chappell agrees. "Saying 'this is where you stayed when you went to New York last time' may sound like a really simple concept but in a lot of TMCs that's quite tricky," he said. "A lot of people are striving to make it happen, but travel is a very low-margin industry and change costs money. If you haven't got a lot of money, you're not going to change unless your customer really demands it."

Covid has depleted the margins of corporate travel businesses even further, and the pandemic has also set back profile-driven personalization in a direct yet perhaps overlooked way. "Personalization by TMCs requires scale, and scale requires volume of transactions," said BCD's Pinnell. "Unfortunately, given the impact of Covid, past travel behavior and activity aren't necessarily predictors of future travel [anymore]. Travel patterns and policies are going to shift dramatically over the next several years. As more people work from home, as more offices close and as more meetings are conducted virtually, we'll establish a new baseline for travel. We'll need to uncover this new normal before systems can begin to predict and personalize the business traveler's experience."

SIGNS OF PROGRESS

In spite of these diverse challenges, there are signs that profile-driven personalization is moving forward. UK-based startup Grapevine won innovation awards at BTN Group events in both New York and London

in October 2021. CEO Jack Dow said Grapevine enables TMCs to offer travelers hotels based on an amalgam of live trip, historical, profile and company policy data, including "where they or their colleagues have stayed before or the kind of hotel they like or people like them like."

Grapevine is in the process of adding personalized airport services, including parking, transfers and lounge and fast-track security access, with a plan to expand to offering bookings for relevant restaurants in 2022.

Dow said advanced data structuring and machine learning are helping the cause and believes profile-driven personalization has the potential to perform better in a business travel context than elsewhere.

"One of the big reasons we decided to focus on business travel rather than leisure is intent," he said. "We know why someone is going somewhere and when, and we know that if they haven't booked a hotel yet they have to stay somewhere. We know that if they are going to an airport, a high percentage will want airport parking. We know that if a plane is delayed they might want lounge access through to in-destination restaurants near their hotel. Rather than Amazon, which is essentially trying to find ways to get you to buy something, our service is discrete. We're trying to offer you things you might like within the context of your trip. We're not an upsell machine."

If travel managers want more profile-driven personalization, however, they may have to express their feelings a little louder. According to Trondent's Wood, the issue has not been a "squeaky wheel" requirement that demands action by corporate travel service providers. Navarro is an embodiment of this observation. "Could profile management be better?" she asked. "Yes, but it's visionary and strategic."

While it may not require an immediate fix, personalization through profile remains a promise she's looking to the industry to deliver. "It's probably something more in the three- to five-year plan." ■

BIG HELP, NOT BIG BROTHER

ENSURING PROFILE MANAGEMENT STAYS THE RIGHT SIDE OF PRIVACY RULES

Even the most cursory examination of profile-driven personalization exposes a concept laden with data privacy challenges, especially in heavily regulated territories such as the European Union.

Personally identifiable information, the very data oil which fuels personalization, carries additional protection responsibilities, but that's just the beginning. Add in geolocation data and links to travelers' social media profiles plus, potentially, medical records, and the potential for misuse (especially if stolen) becomes significant.

"As we've all experienced with personalization, there is a fine line between a magical offer and a creeping suspicion that someone is watching," said Will Pinnell of BCD Travel. "Increasingly, TMCs will need to provide transparency in how that personalization is generated. The service and recommendations should delight, not frighten, the traveler."

Complex ethical issues also arise over the creation of personas: predicting what travelers may like because of a demographic group to which they belong. That may be innocuous if they are identified as, say, a road warrior, but profiles also provide insights into, for example, religious identity based on stated meal preferences, or sexuality based on who is listed as next of kin. "We start to push ourselves into areas of discrimination and bias if that data is in the wrong hands," said Samantha Simms, CEO for The Information Collective, which advises on data privacy matters for travel and other companies.

One potential solution gaining increased attention is for corporate clients to own an independent profile management system, instead of it belonging to their TMC or booking tool provider. Midoco has started marketing exactly such a piece of kit, called Umbrella Faces.

Simms has mixed views about this idea. "Profile management systems are inherently very good because they reduce the risk of data breaches when we have data being held in lots of independent, fragmented locations," she said. But she has some unease about employers assuming direct ownership of so much revealing information about their employees. "It leads to age-old questions

around consent," Simms said. "The reason business travel is complicated [in this respect] is that there is an imbalance in the employer/employee relationship. It is challenging for an employee to give consent to the employer's use of their personal data. Just because I am required to travel does not mean my employer needs to know about my personal preferences."

Midoco's David Chappell said his company overcomes this objection by giving travelers "direct access to their data and therefore they can edit, remove or add as they see fit. It allows a lot of the regulation around GDPR to be satisfied."

Katharina Navarro of Capgemini goes even further. She believes profile-driven personalization is only likely to be GDPR-compatible, and indeed practicable, if the profile management tool is owned by the employer and accessible by the employees. "There needs to be an access point into what information the machine has collected and whether it is still valid," she said. "There should be a right to forget. You can have regular questioning back and forth to the traveler, saying 'here's what we know about you. Do you agree or shall we delete?' It can also really help in streamlining the right content to travelers and remove the frustration of seeing too many things where we only want to see what's relevant."

A new generation of business travel microservice providers like Grapevine and Spotnana are strong advocates of minimizing their own retention of data, preferring to access travellers' information held elsewhere via APIs. "I'm a believer that people should own their own data," said Grapevine CEO Jack Dow. "We've built our architecture to only take the data we need when we need it."

But while Simms applauds the concept, she is less convinced about the feasibility of different providers tapping into a central, independent profile tool on a needs-must basis. "That sounds very complex in an industry that has so many different players," she said. "It sounds like travel and data security Utopia, and I'd love to see us get there. I just think there are so many different issues to overcome that we may be a good few years off actually seeing this work in practice."

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Traveler-First Risk Management

Businesses can get into granular detail about an employee's travel risk, but what is a personal risk profile and can it be implemented with the right privacy controls?

Travel and human resources managers are no strangers to risk assessments. Whether performed in-house or left to a TMC or security advisor, there is generally some form of evaluation of whether a traveler could be put in danger when taking a business trip. But this is usually assessed on the location and the current environmental or geopolitical factors affecting that destination, such as natural disasters or military coups.

The Covid-19 pandemic has highlighted a number of areas in which corporate travel management can change for the better, and the safety and security of employees has risen to the top as a high priority for most companies as travel returns. With so many new factors creating potential hazards for travelers, how can businesses assess the true risk for each individual employee?

One idea floated in recent months is highly personalized risk profiles whereby travelers can disclose details about themselves, such as medical conditions, race, religion, sexual preference and other factors, that might increase their level of risk depending on the destination.

Some companies may already be putting together personal risk profiles for employees under a different guise and for a different purpose, according to Bruce McIndoe, president of McIndoe Risk Advisory LLC.

"The concept has been around for a while. A lot of companies call it 'insider threat,'" McIndoe said, referring to situations where employees may be engaging in questionable business practices or personal gain in ways that

are antithetical to company policies and ethics standards. "Companies collect data on an employee's online activity or the types of communication they're having. They will then create a score that shows the potential for an individual to be a higher risk than anyone else. The people that bubble to the top as the highest risk will get a lot more attention from security managers to make sure they're not conducting fraud or creating other issues that could be detrimental to the organization.

Collecting data on the back-end is not the right approach for a travel program, rather it's understanding how to handle sensitive data. "It's been a long-term practice and I think insider [threat] teams are very familiar with the challenges of collecting that amount of data on an individual in terms of security, privacy and civil liberties. They've navigated those waters for years," said McIndoe.

TRANSLATING FOR TRAVEL

"What we're talking about when it comes to travel is looking at the risk to the person rather than the risk of the person to the organization, but it can use a lot of the same technology and approach," he continued. And rather than looking at the broader risks of a destination, McIndoe said companies could be paying attention to specific risk factors of the individual traveling.

"If I'm of a certain ethnic background and practice a particular faith, my risk profile, even within my own country, might be higher in some locations than someone with different attributes," said McIndoe.

It sounds like good advice. After all, many companies navigate personal risk factors for female travelers, LGBTQ+ employees and disabled workers. But do

employers invite claims of discrimination if they ask for details such as a person's race or religious beliefs? McIndoe believes it's all about the terminology.

"When I talk to companies on this topic, I try to couch it in the term 'vulnerability' rather than 'risk'. What you're really doing is creating a vulnerability profile—these are the personal factors that could, depending on where I'm going, increase individual risk."

The approach could have expanded application for Covid-19-era business travel, said McIndoe. "In the current pandemic, if I'm immunocompromised and I come into contact with Covid-19, I'm at higher risk of becoming infected and seriously ill than a healthy 18-year-old." Even as the pandemic wanes in certain geographies, traveler health is likely to remain a top concern for corporations and top of mind for travelers themselves.

But there are plenty of other attributes that contribute to a person's personal risk profile, said McIndoe. For example, "Being gay is not a risk in itself, but it is a vulnerability if I'm in an environment with anti-gay sentiments. [Leading with a personal risk profile] is about identifying vulnerabilities in the context of the threat environment. If there's a threat but I have no vulnerabilities, then the risk is lower for me."

COULD RISK PERSONALIZATION LEAD TO UNEQUAL TREATMENT?

Founder and director of intelligence at Tapis Intelligence Philip Stewart said he worries companies might become too focused on small details.

"Obviously, you have to manage the risk of everybody individually and

"What you're really doing is creating a vulnerability profile—these are the personal factors that could, depending on where I'm going, increase individual risk."

McIndoe Risk Advisory's Bruce McIndoe

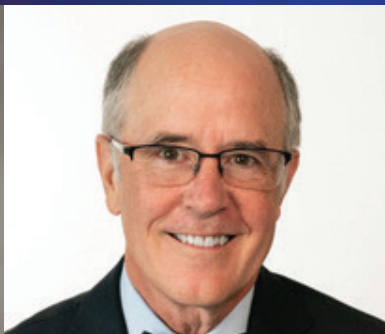
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consider their personal risk as much as possible, but if a profile showed that an employee identifies as LGBTQ+ and they're going to the Middle East, but a colleague is straight and going on the same trip, would they get different advice because risks are different? Would the travel manager actively reach out to the LGBTQ+ person but not the other? I think you'd be treading on dodgy ground if you started doing that.

"Every traveler should get information about all the risk factors of a destination so they can come forward if they have any concerns or want to know more. Employees should be able to make informed decisions about their personal level of risk. I'm not sure it should be the company making those decisions."

Looking at the prospects another way, however, risk profiles could have some advantage when it comes to identifying medical vulnerabilities. Dr. Luke Kane, medical officer at Healix International, said the pandemic has highlighted the need for businesses to have open and honest discussions with their employees about their health.

"I think there has to be a culture of trust within the organization whereby employees feel comfortable disclosing medical conditions that might put them at greater risk, and they should feel confident that the information will be safe and not used against them," Kane said. "Companies need to harbor an environment of open communication, and employees should feel able to raise their hand and speak up if they feel uncomfortable about the questions being asked."

TRUST... BUT NOT SO MUCH

Acquiring such personal information creates a tricky situation for companies. Asking employees about their religious beliefs, sexual preferences and health status might raise concerns about data protection, particularly with attributes considered highly confidential. With the rise of social media and in an era of increasing data theft, there's a commensurate rise in awareness in how information can get into the wrong hands and the effect that can have on individuals.

There are also details employees might not wish to disclose to their employer, such as a woman in early pregnancy who wants to wait to inform her company in order to avoid potential discrimination because she will require maternity leave.

McIndoe believes one way to effectively manage the data and avoid unease for employees is to put it in their own hands so they can then decide what information to share and when.

"My recommendation is for companies to provide risk information or even a tool for people to run their own self-assessment without storing data and divulging that data to the company. They can fill out a form that doesn't store the data and at the end they get a personalized recommendation based on their answers."

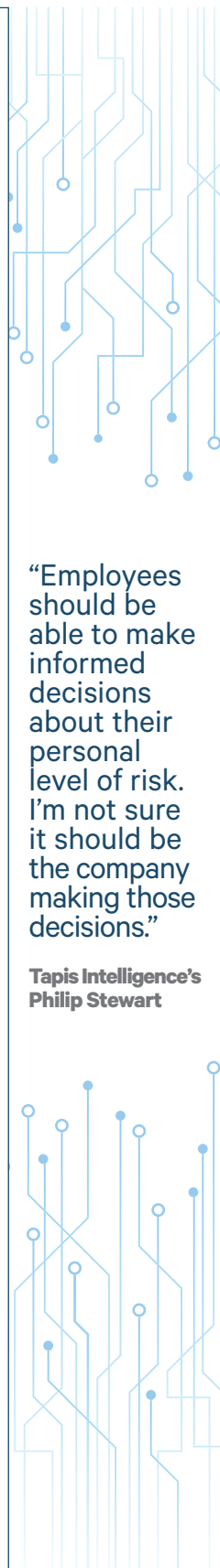
Kane sees the issue differently. "If a company has made the decision to conduct personal risk calculations, they should be willing to collect and protect that data rather than leaving it to the discretion of the employee. If a person doesn't want to share that information, that's their decision, but if a firm has committed to operating profiles, they need to be in charge of managing the data."

Kane also believes companies risk collecting too much data on their employees.

"Through my work with the [UK's National Health Service] I understand the basics of the General Data Protection Regulation and I know that companies need to tread carefully. There have to be robust protections in place and employers should only ask for the information they deem to be essential for conducting risk assessments. Again, employees need to feel safe speaking up if they feel they're being asked too many questions."

TOO MUCH INFORMATION

Tapis Intelligence's Stewart said collecting such data could become too resource-heavy for many companies. "It's potentially a waste of time because it would be quite labor intensive to maintain that data and I'm not sure how much benefit the profiles could offer. It's an interesting concept, but how



"Employees should be able to make informed decisions about their personal level of risk. I'm not sure it should be the company making those decisions."

Tapis Intelligence's Philip Stewart

would it be managed? It would be very time-consuming to have either the employee or a manager ensure each profile is kept up to date.

"Risk management should be an enabler of business travel. It should open doors and allow people to operate in these new and challenging environments. If personal risk profiles or questionnaires add another layer of bureaucracy, I think it could be very limiting for a company's travel program."

There also could be regional differences in how employees—and governments—view the practice of personal risk profiles, particularly when it comes to disclosing certain health information. In England, Scotland and Wales, employers are subject to laws and regulations under the Equality and Human Rights Commission, which guarantee a person's right to a private life. One regulation of particular focus now is the fact that companies cannot require employees to disclose their vaccination status, though with current country-by-country restrictions in place, a worker would obviously have to divulge this information if it means they cannot travel to a particular destination.

That stance differs from the U.S., where government contractors are required to be vaccinated against coronavirus and several airlines have instituted vaccine mandates. Some companies, like JPMorgan Chase, also have introduced business travel bans for unvaccinated U.S. employees and those unwilling to disclose their status.

It's unclear how long such mandates will last or whether they will proliferate. One question is whether they can be legally enforced—certainly they will be challenged. Whether companies move forward with the concept of personal risk profiles remains to be seen. If they do, it seems clear that the information involved would be voluntarily disclosed for the benefit of the traveler, unlikely to be mandated and lack of a profile could not be a blocker to business travel itself.

"If you deny a person the ability to travel for work and all the benefits that come with it, I think you risk stepping into the realms of discrimination," said Kane. ■

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Will Travel Enable the Work-Where-I-Want Ethos?

Travel managers may have a critical role to play as companies implement 'work from anywhere' benefits and the in-office worker becomes a rarer breed.

At some point during the pandemic, the idea that return to business travel had to be tied to return to office strategy began to fall apart.

For a significant percentage of workers—one EY study from June says more than 80 percent—remote work has evolved from being a forced adaptation to being a driver for quality of life. It went from a shocking reality to a bona fide employee expectation. And the idea that employees, specifically, knowledge employees, should think about their jobs as a function and not necessarily tied to a particular location has gone mainstream. It's amped up by accessible Wi-Fi connections, VPNs, high-quality videoconferencing capabilities and cloud-based collaboration tools.

"Earlier [in the pandemic] return to the office and return to work were connected, but over time there doesn't seem to be a huge connection between the two," said EAB vice president of business solutions Steven Mandelbaum. "When it was all about social distancing and not getting together, at that point it was the same. Over time, it may not be the health conditions [we have to think about] but what is the best place for work. Now, we have to think differently."

For EAB that means a new workplace mindset the company calls "Successful Days." No matter where employees need to work—at home, in the office or away from both—the company needs to enable them to be productive. "We literally want to ensure they have successful days," said Mandelbaum.

Some employees always knew their job wasn't tied to a particular place—you guessed it, business travelers.

Now that more employees are looking to break the shackles between work and being "at the office," managing the implications of new segment of roaming workers is looking like a challenge that travel managers may be in a position to tackle. Or, at least help.

IS 'WORK FROM ANYWHERE' A REAL THING?

According to MBO Partners, about 10.9 million Americans in 2020 described themselves as digital nomads, compared to 7.3 million in 2019. Co-founder of startup global tax advice marketplace Work from Anywhere John Lee said those numbers are on the rise in 2021, as employees realize the power dynamic is on their side in a dramatically changing workplace and in the midst of what appears to be a growing labor shortage—at least in the U.S. and Europe. As a result, companies are figuring out how to offer "work from anywhere" as an employee benefit and how to establish policies to manage it.

"If your competitors are offering 'work from anywhere' and you're not offering some items of it, you're going to lose your best talents," Lee said, adding that companies have to weigh the administration aspect of having such a program over the risk of not having it. "Companies have to look at the costs and benefits and when it makes sense to get the talent they want. It may not be an option for everyone, but they may need it for others."

Festive Road consultant and self-proclaimed digital nomad Aurelie Krau got more specific. "I saw job offers last week. [A company is] developing their activities in the Middle East, and they were looking at people in Dubai. Within the job offer it said the employees would be allowed

to work for up to three months... from wherever they want." There are plenty of similar offers, she said.

Lee said "work from anywhere" is not a new concept—rather, an expansion of an old one travel managers know well.

"It was called business travel for people traveling less than seven days, and it was called expats for people going for more than 365 days. Plus, we hired from anywhere before the pandemic, as well," he said, "so it's not like we are working from complete scratch. You've got a lot more people looking to go for more than seven days and less than 365 days—it's a whole new kind of emerging segment in business travel; it's like extended business travel."

The evidence for this trend has filtered through business travel platforms and data. 2021 data from hotel solutions platform HRS showed 39 percent of corporate bookings extended longer than eight days. This compared to such extended stays comprising only 8 percent of bookings in 2019.

HRS CEO Tobias Ragge said anecdotal discussions with travel managers indicate the trend is here to stay—so much so that HRS has created a new "long-stay" segment to display in its booking tool. "[It's] a noteworthy new reality for buyers and suppliers as our industry looks towards recovery," Ragge said in a statement announcing the new feature.

READY... SET... NOT SO FAST

The tricky part now will be managing visas, immigration and tax implications at scale for remote workers—and this is where travel management skills come into the picture.

"Over time, it may not be the health conditions [we have to think about] but what is the best place for work. Now, we have to think differently."

EAB's Steven Mandelbaum

Travel managers have seen a growing challenge in the past several years, with visas, work permits and tax regulations becoming more complex. Countries and even municipalities have implemented new or are now enforcing old taxation and immigration regulations. More countries are cracking down on traveler immigration as a political tool to show they support local workers; and they are getting more sophisticated about how they do it, introducing more digital immigration processes and tracking capabilities.

"It's the law," said Blue Dot CEO Isaac Saft, whose company manages global taxation for clients. "You have to answer to [tax] authorities and you have to have the data to do that. If they are staying five days in New York and 20 days in London, that's no problem. Your challenge is to have the data."

Seeing complexity on the rise, heavy hitters in the business travel and compliance industries came through with some integrated solutions. In 2017, EY rolled out an immigration and tax compliance suite called TRAC that sits over the Concur Travel booking tool and throws back an instant compliance analysis for the trip. Tallying total business travel days in the destination was a key feature. Deloitte launched a similar app with SAP Concur called Travel Ready in November 2020. Dedicated consultancies and services like Blue Dot, Global Tax Network and Work from Anywhere are now keen to serve companies that don't yet have business travel compliance strategies and solutions locked down—and many don't.

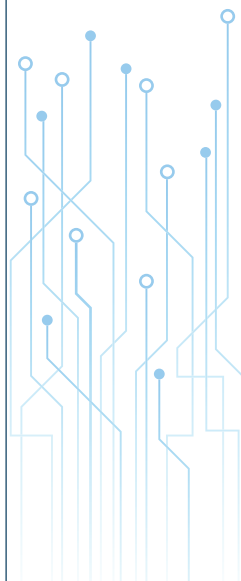
Brexit, alone, has thrown spanner in how U.K.-based, cross-border business travelers will have to operate once business travel returns in earnest to the European continent. But it goes far beyond Brexit, and prior to the pandemic, travel managers were feeling the pinch—should they enable frictionless business travel or potentially put their company at risk of being audited and penalized?

These challenges only expand if remote employees set out on their own, and work while they are away—one, two, maybe three months at a time. It



"There will always be some limitations for employees. The tax piece is a nice excuse, but companies need to find solutions."

**Festive Road's
Aurelie Krau**



exposes companies to risk, and they may look to travel managers to support.

Ford Motor Co. global travel manager Stephen Swift said his company is beginning to look at the potential for remote work policies—though it's very preliminary. Swift himself realized that tax implications and proper cross-border worker documentation would require much more rigor once Brexit took full effect and when travelers returned to more active patterns after the pandemic.

"It was clear what we really needed was to automate the process," he said, to remove friction, but also to capture all the information and data required to stay compliant. Swift is in the process of integrating Ford's travel approval process with a workflow that will automate proper documentation. As a former relocation manager, Swift has deep knowledge of employee mobility and has reached out to some of his previous contacts to connect the dots for tax and visa compliance automation.

Ford has not contemplated the idea of enabling worker-driven "work from anywhere" ethos, but rather the reality of longer business trips. Swift acknowledged that the technologies and systems he's looking to integrate on the business travel side have caught the interest of the human resources team to whom he reports—and positioned him as a trustworthy consultant as they grapple with creating new frameworks and potential policies for such workers.

Lee said travel managers would likely be a key component of the cross-functional team required to contemplate and execute the work from anywhere strategy. It helps, he said if they already have relationships with or report directly into HR. Showing an interest in the challenge and demonstrating expertise with potential solutions could be enough.

"Companies still have a few months to get their act together on this, and I've no doubt a lot of them are already discussing what's critical," he said. "But it can't be achieved in a silo. It's got to be done cross-functionally with travel, yes, but also with HR, with tax compliance, with legal and with global mobility. I do think it's a real opportunity for travel to

come together with mobility to offer strategic solutions once HR and the C-suite set the higher-level objectives."

THE TRENDS ARE ACCELERATING

"I've been trying for years to articulate the benefits of a work from anywhere strategy," said Krau, "but apparently it took a pandemic, you know, for people to realize that employees can be more efficient, more productive and probably drive more loyalty into the company when they can work more on their own terms. It's management based on trust and outcomes—and obviously, if the outcomes aren't there, then it's a different problem."

And while Krau acknowledges the complexities involved, she's not buying any excuses from businesses that are well positioned to enable remote workers but won't. "There will always be some limitations for employees. The tax piece is a nice excuse, but companies need to find solutions," she said.

Some countries are working to ease the burden—and want to encourage digital nomads to set up shop for a while. Many are looking at the burgeoning work from anywhere segment as a way to boost international tourism revenues—the lack of which has crippled many local economies.

Indeed, several Caribbean islands jump-started a trend through the pandemic of bringing new kinds of travel visas to the table. But even locations like Croatia, Dubai and Estonia have developed their own versions to welcome digital nomads to settle within their borders for anywhere from six months to two years, usually without the individual or their company having local tax obligations. As of October, 22 countries around the world had rolled out some kind of remote work visa, charging anywhere from \$1,500 to \$3,000 for long-stay visitor permissions.

As countries create more opportunities like these, the challenge to accommodate employee's desires to 'work from anywhere' may ease in terms of compliance. Until then, travel managers with curiosity, skill and the will to move their workplaces into the future, may have a new path to follow. ■

COMING TOGETHER IN A REMOTE WORK WORLD

BRINGING EMPLOYEES TOGETHER WILL BE KEY TO DRIVING CORPORATE CULTURE

“You still have all the use cases you had for travel prior to the pandemic,” said EAB VP of business solutions Steven Mandelbaum. “But bringing internal employees together is going to be a lot more important than it was before.”

Festive Road’s Aurelie Krau agreed. “You may need to get teams together five or six times a year. Maybe there will be one big offsite meeting per year—and maybe that means you are going to source your programs differently than before. This is one of the top priorities when we talk to travel managers about what changes in the new remote work environment.”

And Mandelbaum sees it changing the needs of travel management, particularly in one category.

“If I was to bet on one segment right now, it would be hotel,” added Mandelbaum. “I think we’ll see a renaissance for hotels,” if they can provide the right kind of meeting spaces and technologies. “Convention and conference travel will be up as well, he predicted. “In a world where people don’t do so many one-on-one visits, conventions, meetings and conferences will be a very efficient way to see a lot of people.”

HOME AWAY FROM THE HOME OFFICE

Hotels got creative during the pandemic, offering rooms as ‘away day’ alternatives for workers who may have been languishing in the four walls of makeshift home offices. But even as home offices morph into more permanent features, hotels continue the drive to provide an opportunity for workers to have a change of scenery.

Even prior to the pandemic, Accor was on the path toward co-working spaces, rolling out a co-working space strategy in 2017 and rebranding it to WoJo in 2019 before travel cratered. The idea, according to the company, was to bring non-travelers into the hospitality space and provide more opportunities for the local community to benefit from the hospitality brand. Unlike the pandemic trend to set workers up in private rooms, the WoJo strategy is to create community spaces at dedicated WoJo spaces as well as smaller meeting rooms, pods and open collaboration spaces within the network of hotels themselves. At last count,

WoJo had 14 dedicated sites and was rolling out smaller in-hotel locations throughout Europe. Some independent brands in Europe, like Zoku and Schani, have invested in similar concepts on a smaller scale.

The strategy is similar to WeWork, which revived during the pandemic after a precipitous downturn in 2019, Regus or the meetings-oriented cousins Convene or ETC Venues, which also offer on-demand workspaces as part of their core offering. Commercial real estate company CBRE in an October study said 43 percent of recently surveyed clients would expand their use of flexible workspace options in the future.

According to the report, flex space providers are getting more flexible, and that’s expanding their appeal for remote workers and employers who want “sometimes” services. “Operators are offering on-demand and desk-pass services, which allow people to use their services whenever needed. These services are providing companies more flexibility in establishing remote work sites for employees who want additional options beyond the central office.”

USE WHAT YOU HAVE, SOURCE WHAT YOU DON’T

Companies are reconsidering their own office spaces as they look at the world of work differently. Travel managers are getting the message that in a hybrid work environment, there will be plenty of open spaces available to remote workers traveling into the headquarters location.

At the BTN Group’s innovate conference in New York last month, buyers in the audience consistently asked meeting technology vendors if corporate working spaces could be included in booking platforms. The answer—for both companies—was either ‘yes’ or ‘that’s on our roadmap’.

The trend, said Krau, could lead travel managers to a new sourcing strategy—establishing co-working privileges with preferred partner hotels and meeting venues that offer them, and potentially getting those spaces as well as their internal corporate spaces all into their online booking tools.

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Is Managing Non-Travel a New Frontier?

Reluctance to travel will remain an issue, even after travel generally opens to employees. What travel policies or tools need to be in place to deal with this—and when does it become more an HR issue than a travel issue?

As the CEO of a marketing and advertising agency, Rick Milenthal has seen the recent turbulence in business travel from all sides. A pre-pandemic frequent business traveler with a typical annual load of 100 nights on the road, Milenthal, the CEO of Columbus, Ohio-based agency The Shipyard, has adjusted to Covid-era business, even acquiring another agency in a process conducted entirely over remote conferencing.

But as business travel ramps back up, Milenthal is finding that not all his employees are entirely comfortable hitting the road. “We have a lot of young people and a lot of young parents,” he said. “The discussion around a trip—who will come, who won’t, who will do video—is significant. It’s a journey.”

That’s understandable, Milenthal said: More than 18 months into the Covid-19 pandemic, there remained enough U.S. spread of the virus to give employees pause. Plus, all his employees by now are accustomed to working remotely.

“We’re very sensitive to what people feel is good for their safety,” Milenthal said. “I think every meeting for the next year and a half will be a hybrid meeting. So you’ll go, and there will be a number of people who will be on video, both from us and the people we’re visiting. I don’t see that changing.”

These changes in Milenthal’s eyes are due to Covid-19, a move necessitated by concern about the virus. But as the pandemic wanes and vaccination levels increase, it’s far from clear that business travel volumes will reach 2019 levels anytime soon, and that’s not just due to Covid-19. A new generation of employees may be more cognizant of the environmental impact of their business travel, or may conclude that frequent business travel is not fully compatible with the work-life balance they want to achieve.

Perhaps in the not-too-distant past, these concerns might be met with a suggestion that the employee find another job with levels of travel more to his or her liking. But the post-pandemic workplace may well be a new frontier, with employers, conscious of the need to retain talented employees, more willing to entertain such preferences to travel less, whether due to Covid, wellness, balance or sustainability.

“I think it’s a new normal,” said Kelly Ellis, global practice area lead for traveler engagement for BCD Travel’s Advito travel consultancy. “I really feel like the culture has shifted, and so many people are finding they can be responsible working from home and get the job done without having to travel. There are still exceptions, but I think there will be a shift for sure.”

Should such increased levels of business travel reluctance materialize, executives will have to decide how they will manage it. Should they consider a formal policy that governs the circumstances under which employees could decline travel, or should they instead adopt a more informal approach, weighing each entreaty on a case-by-case basis?

Most companies remain occupied with immediate-term concerns of bringing employees back to their offices safely, with longer-term concerns just that. But the day is arriving when the notion of a post-Covid, travel-averse employee might be far less theoretical, and travel managers and senior executives alike would be well served to consider their approach now.

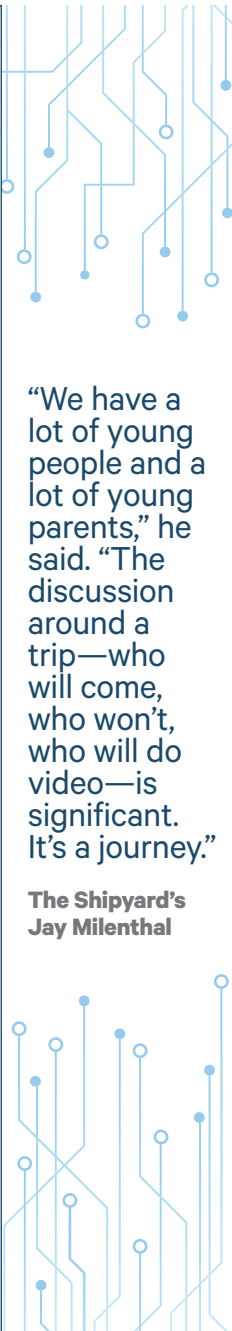
FINDING A BALANCE

Travel suppliers and research firms since the start of the pandemic have surveyed workers about their willingness and desire to travel for business and generally found that many travelers are willing and some are eager. The Global Business Travel Association, for example, for months has surveyed travel manager members about their travelers’ willingness to hit the road; generally three in four consider their travelers willing.

But that’s not everybody. Many surveys have shown a minority, but not a tiny one, of business travelers aren’t eager to resume a life of airplanes and hotels. For some, that’s likely a reaction to Covid-19, a feeling that will ease as the pandemic does. But for others, it could be permanent, and they’re the ones who could drive some change to established travel philosophies.

“I believe we’re going to be seeing more personalization in general, but also more choice on when do you actually physically travel,” said Tammy Krings, founder and CEO of travel management company ATG. “We’ve all learned that we can do business remotely, internally with our colleagues, but also with our customers. We’ve learned the value of being face to face with someone. And that is a high-value proposition, but it also comes at a high cost to an individual. So people who are now used to working from home, having the choice of a videoconference, might opt not to get on the road.”

Covid-19 might have opened this door, but it’s not the only driver. Sustainability practices have increased in prominence throughout the world, and most large global companies have a public environmental strategy. Employ-



“We have a lot of young people and a lot of young parents,” he said. “The discussion around a trip—who will come, who won’t, who will do video—is significant. It’s a journey.”

The Shipyard’s
Jay Milenthal

ees could well take their cues here and conclude that one way to address their own part in reducing carbon emissions is to reduce their own travel.

"In talking about the environment and sustainability and CO2 emissions, it's become more than just a sort of a casual discussion about saving the world," Krings said. "It's turned into a real initiative."

And underpinning these changes, said Brandon Strauss, co-founder and partner of business travel consultancy KesselRun Corporate Travel Solutions, is a demographic change to the workforce that lends itself to these types of discussions.

"You now have more Millennials who are in leadership and senior leadership positions who have different work habits, consume products and behave differently than Gen X-ers," Strauss said. "So you've got this confluence of changing demographics who resist the technologies and processes that they don't think are efficient. ... perhaps, not as efficient as new technologies, as shared economy that this generation genuinely does think about what is best, what is the most efficient, what is the best thing for the company."

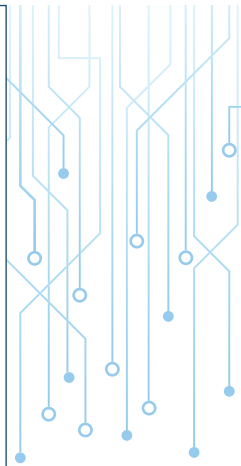
"And now you've got Covid that shut everyone down and made everyone think, 'You know what? Maybe there's a better way.'"

DON'T ALIENATE

It might be tempting to simply remind travel-reluctant employees, especially those in sales or other customer-facing roles, that travel is part of their professional responsibilities and they should treat it as such. But that's a bad idea. Companies of all sizes found difficulties in finding and retaining employees, and keeping productive employees content will be a key challenge.

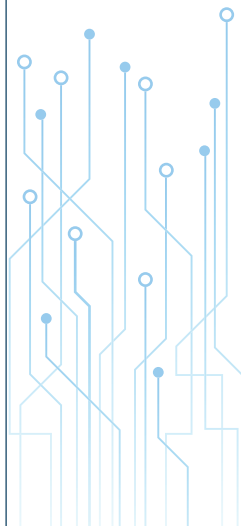
"Because getting access to good talent is so important to so many businesses in so many industries, there's going to be a pretty high tolerance for [employees who say] they're not comfortable taking that trip," said CWT managing director of global customer management Nick Vournakis. "I think you'll see a fair amount of flexibility."

Many of these employees are aware that some companies already have become quite permissive in terms of travel



"So many people are finding they can be responsible working from home and get the job done without having to travel. There are still exceptions, but I think there will be a shift for sure."

**Advito's
Kelly Ellis**



and other workplace policies, Advito's Ellis said.

"The demographics of the workforce today play a huge factor, but everybody sees Google, and everybody sees tech companies in the Bay Area," she said. "They're competing for those resources, so how can we keep up with the Joneses? They're setting a precedent on work-life balance and finding that center for their workforce."

A FORMALITY?

Managing these traveler preferences, though, could offer a level of complexity. Milenthal said his company hasn't drafted any formal policy about travel reluctance and its handling it as situations arise.

"It's case by case," he said, noting that reluctance could ease as vaccination mandates proliferate. "Once that becomes practice, then the comfort level is going to rise considerably among our clients, stakeholders and employees that they're in a healthy situation in a meeting. I would think by the second quarter of next year that it will be a little more policy-oriented."

Whether to codify any formal language surrounding travel reluctance in policy might be a better question for a human resources department, suggested Partnership Travel Consulting founder and CEO Andy Menkes, but information could be included in an employee profile about their travel preferences.

"If a certain segment of the employee base for personal reasons isn't ready to travel at this point in time ... there's a fair amount of potential substitution" via remote conferencing that a company should support, Menkes said.

Ellis also said she didn't consider it likely that companies would develop policy specifically to address this preference, in part due to an overall rethink about the role of a travel policy.

"I feel like we were in a shift pre-Covid, where a lot of companies were getting away from true mandated policies and moving toward guidelines," she said. "Act like an owner, it's your responsibility to make the right choices. I feel like that shift was already happening and this pushed us over."

Still, the lack of a policy governing instances when travel could be declined could bring trouble of its own. A world in which middle managers judge their employees' reluctance case by case raises the specters of unequal treatment and inconsistent decision-making. While that may be an unavoidable cost, it shouldn't be dismissed, either.

"Corporates already have a tool in their toolkits to manage that, and it has to do with performance," Vournakis said, "The questions corporates will have to ask themselves is: Does having an employee not travel affect their ability to perform their duties in the way we expect? But if it causes a performance issue, it will be managed as a performance issue."

Vournakis suggested that willingness to travel in the future could be a larger part of employee recruitment, although that's likely more of an HR management issue than a travel management concern.

"Maybe an individual's willingness to be on the road is an element that gets tested in more depth in the interview process," he said. "Maybe not in the medium term, but in the longer term there could be some real concerns to manage."

In the interim, companies likely will have to wait and see. Has Covid-19 opened the door to a new era of travel reluctance, fueled by younger employees and tolerated by senior executives? It's unclear, but Strauss suggested the notion of travel policy as a strict compliance tool may be more of a relic than a prologue.

"I think to some degree, it's going to be about how companies adapt to all the changes that we're seeing in the industry and think strategically about who their travelers are, what their needs are and what they have to do in terms of retaining talent," Strauss said. "So I don't think it becomes a matter of, 'Well, given all of this, how do I put the clamps down?' I think it's, 'Given all of this, how do I take the resources that are in the marketplace and make them as efficient as I can for my organization?'"

Some of those resources are likely not to be travel solutions, but travel managers should consider how the alternatives can be integrated into the travel environment—at least philosophically. There are tools on the market today that can help would-be travelers weigh their business priorities, and if travel isn't the answer, the travel platform should be ready to enable a non-travel experience by promoting the best tools for the job. ■