

BTN

BUSINESS TRAVEL NEWS

May 15, 2023



TRAVELER EXPERIENCE INDEX

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UNITED



A STAR ALLIANCE MEMBER

EDITOR'S LETTER

Quality vs. Quantity

If there's one thing BTN uncovered as we looked at how travel managers approach the business travel experience, it's this: Travel managers are passionate about their programs, and they want the best for their travelers.

Traveler-centricity, however, isn't always the most rewarded strategy for the travel manager. Conversation at a recent industry event turned to the concept of "putting travelers at the center of the program," and while program managers always have that goal in mind, they said they are often rewarded more for year-over-year savings and cost avoidance. Especially in an environment of rising travel costs—like right now—those divergent objectives may not easily come together in the program.

Perhaps counterintuitively, some travel managers are turning the situation into an opportunity. Travel costs are higher, and only so much will be negotiated with suppliers in terms of rate. For many companies, however, travel volumes remain somewhat lower than pre-pandemic, and there is a sense—among travel management companies, among travel distributors and among many buyers—that we may be entering into the "new normal" with volumes remaining here as a more steady state.

Amex GBT said as much on its recent earnings call, telling investors it had started "to move away from recovery rates versus 2019." The company has hit 76 percent of 2019 transaction volume at this point and that number is starting to look like a good industry benchmark. Amadeus, similarly, said bookings in its platforms ended the quarter right at 75 percent of 2019 transactions; Sabre reported 80 percent. ARC transactions are dancing around that number, and more TMCs are reporting similar volumes.

Accepting that travel costs more than it did previously but that many companies will be traveling a little bit less, travel managers are pivoting on an opportunity to improve the trip experience.

They are keying into traveler expectations, exploring a deeper focus on value as opposed to rate; they are looking at new ways to manage suppliers to better performance metrics; and, very importantly, looking at how internal program culture, policy and platforms define the business travel experience as part of the company's overall employee value proposition.

BTN looks at all these areas in this issue, and why they matter now more than ever. But first, we start with the traveler—and introduce a new survey tool for our BTN audience to use with their own travelers.

We hope you enjoy this issue, and we hope you will use the BTN Traveler Experience Index survey tool to begin your journey to improve the business travel experience.



Enjoy this issue,

Editorial Director, BTN Group

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Dear BTN travel industry family,

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Thank you for taking the time to read through the Business Travel News Spring Research Issue. We look forward to welcoming you and your travelers onboard a United flight soon.

Sincerely,

Doreen Burse
Senior Vice President – Worldwide Sales
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WHY IT MATTERS: BUSINESS TRAVEL EXPERIENCE

It's tough out there. Airline and transit strikes, hotel labor shortages, car rental shortages... being a business traveler isn't easy. How the business supports the traveler is critical.

BY ELIZABETH WEST

A vast majority of employees surveyed by Business Travel News from April 15 to 25 for the BTN Traveler Experience Index characterized travel as a fundamental work enablement mechanism for their current roles. More than 83 percent of 309 full-time workers said that business travel was “important” or “very important” to their job success. More than 84 percent said it was “important” or “very important” to their job satisfaction—and that latter number has become increasingly important.

METHODOLOGY

Business Travel News fielded the 2023 Traveler Experience Index survey April 15-25 in partnership with Equation Research. BTN defined business travelers as anyone who had taken at least one trip on behalf of their organization in the past 12 months that included a rail or air journey and at least one overnight stay. As a secondary qualification, 85 percent of respondents were required to have an expectation of at least three business trips in the upcoming 12 months. A total of 309 qualified respondents answered the survey. BTN offers an ongoing version of this survey for the use of travel managers. Access that tool and apply for a unique link at www.businesstravelnews.com/traveler-experience-index.

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A STAR ALLIANCE MEMBER



AIR CANADA

Companies are reaching for every tool in the box when it comes to retaining employees in tight labor market. The latest jobs report in the U.S. was expected to see hiring rates level off, after downward revisions to February and March hiring rates, but April came in 70,000 jobs over expectations, driving unemployment rates down to their lowest level since 1969. A similar situation in the U.K., in large part driven by the retirement of older workers combined with a Brexit-driven reduction in incoming workers from the European Union has stymied efforts to staff up businesses there as well. Both France and Germany are looking to revise immigration regulations to attract skilled workers into jobs unfilled by citizens. It’s an issue that has businesses upside-down in terms of meeting pent-up demand for goods and services post-pandemic.

A report from the U.S. Chamber of Commerce earlier this month cited flexible work hours, continued remote/hybrid workplace initiatives, mental health and wellness initiatives, home-buying assistance, fertility assistance, pet insurance and a number of other life-enhancing benefits that will sweeten the recruitment pot for prospective workers and help hang onto the workers companies already have.

While travel programs and policies may not be the pivot point upon which employees make stay-or-go decisions about their jobs (though, in some roles, it could be), businesses would do well to scrutinize the management of something perceived by employees as being a central



enabler to their success and satisfaction and how effectively that management delivers on employee needs and expectations.

BTN’S TRAVELER EXPERIENCE INDEX

Business Travel News started down that road by fielding BTN’s Traveler Experience Index to 309 business travelers, who have taken at least one trip in the last 12 months and expect to take at least two trips, including air or rail travel and an overnight stay, on behalf of their companies in 2023. BTN asked business travelers to rate 22 business travel experience factors on an ascending scale of one to five on their importance to the traveler as well as how effectively their company delivers on those factors.

The raw ratings aim to identify business traveler priorities when planning, executing and returning from a business trip, but also to identify gaps between those priorities and the support levels offered in their companies’ travel structures—i.e. travel and expense policies, processes, technologies and supplier partnerships. Or, in the case of a small percentage of respondents, how the lack of those managed travel structures also impacts the business travel experience.

From those raw scores, BTN has created an index score that weights the relative importance of each factor to a given group of travelers so that it acts as a multiplier on either effective program support (positive impact) or ineffective program support (negative impact)—and, therefore, magnifies those impacts. The final shift formulates all of those factors and weights into a Traveler Experience Index score on a 1 to 100 scale. A score of 50 would be completely neutral—that the program seems adequate, and while there may not be any passionately negative perceptions of the program, there’s no particular positive impression either. Even the latter may lead to compliance issues if a more compelling business travel proposition is offered elsewhere, potentially through supplier loyalty programs or “free-mium” travel tools available in the marketplace.

BTN has opened this tool to all travel managers interested in benchmarking their travel programs via a simple three-step, data-protected process. To access the tool and apply for unique credentials, visit www.businesstravelnews.com/traveler-experience-index. The tool is free to use.

The following data set—as well as the demographic-oriented stats that continue the article—provide a view of 309 business travelers whose total response offers travel program managers visibility into common themes driving business travel experience today.

BTN’s Traveler Experience Index

A bird’s-eye view of what’s important to business travelers now, and how effectively their respective companies deliver to those needs. Both measures are an ascending scale of 1 to 5, where 5 equals “very important” or “very effective.”

EXPERIENCE FACTOR – PRE-TRIP	Importance to traveler	Effective program delivery
Understanding trip purpose / objectives	3.70	3.74
Clear travel policy / spending guidelines	3.66	3.72
Reliable travel suppliers that support business needs, including premium products when required	3.82	3.68
Latitude to build convenient business travel itineraries that support sleep patterns, fitness and nutrition and trip recovery	3.51	3.67
Access to virtual meetings tools and option to use them when travel does not fit my work or personal priorities	3.75	3.83
Self-service shopping / booking tools that tap my travel profile and history to return relevant choices	3.53	3.68
Access to a quality agent to book travel for me	3.55	3.55
Carbon emissions indicators in the booking path / guidance on reducing emissions of my trip	3.37	3.42
Real-time mobile itinerary management with current conditions that impact trip prep	3.70	3.80
Real-time severe risk advisories	3.89	3.82

EXPERIENCE FACTOR – ON TRIP	Importance to traveler	Effective program delivery
Access to tech-based disruption support	3.61	3.71
Access to agent-assisted disruption support	3.76	3.79
Mobile notifications that alert me my supplier loyalty benefits and/or the company’s negotiated benefits	3.64	3.72
Access to in-policy, reliable internet and data connections	3.80	3.79
Latitude to make real-time, on-journey travel decisions as required	3.79	3.79
Travel tools/memberships that ease travel processes	3.84	3.79
Prominent security structures that support traveler safety and wellbeing	3.71	3.73
Support for blended leisure/business travel, including access to curated local recommendations	3.84	3.81

EXPERIENCE FACTOR – POST-TRIP	Importance to traveler	Effective program delivery
A process and/or tools to report achievement of trip objectives	3.70	3.71
Opportunity to provide feedback about the quality of trip/supplier services	3.70	3.74
Ease of expense reporting and quick reimbursement	3.95	3.78
Compensatory time if business trip spanned weekend or holiday	3.92	3.89

HOW TO READ THESE DATA TABLES...

Look for high “importance” scores to understand where travel program changes could have the most impact for the group. And consider how your group demographics might impact their opinions. Low “importance” scores indicate areas that need less attention, according to the traveler. The organization may have other priorities.

Look for low “effectiveness” scores. Anywhere high “importance” aligns with low “effectiveness” signals a prime opportunity. Best-in-class programs should score fours for effectiveness.

Your Mileage Will Differ—Try It!

BTN scored the “travel program” here at 67.7. A score of 50 is neutral. A company with ratings like this, net out on the positive side of satisfaction, but only slightly. Would a step-change experience elsewhere—in the consumer market or direct with suppliers and loyalty programs—begin to siphon compliance away from organizational policies? It’s likely.

In reality, the travelers surveyed for this data set do not represent a single corporate culture or business community—how would your company’s results differ?

BTN’s Traveler Experience Index survey tool can give you those insights. Check it out.

Voice of the Business Traveler

BTN Asked: What's the biggest challenge traveling for business now?

"The biggest challenge to business travel now is that new threats are emerging regularly. These threats include diseases, wars, terrorist acts. None of these can be planned or anticipated."

Gender: Male
Age: 39

Travel Intensity: 6 to 10 trips annually
International: 50% or more



"Flights that stay on schedule. It has been more challenging to get connections with flights the past two years, which has caused delays in getting to meetings in the time frame needed."

Gender: Female
Age: 36

Travel Intensity: 6 to 10 trips annually
International: 11% to 20%



"Too often, employees find themselves collecting expenses and receipts and submitting them in bulk for approval—whether that's once a month or once a quarter. This fatigue creates an opportunity for manual error, which will result in misreporting and reconciliation later on."

Gender: Male
Age: 52

Travel Intensity: 11+ trips annually
International: Less than 5%



"Staying within budget and being comfortable, getting the work completed."

Gender: Female
Age: 41

Travel Intensity: 4 to 5 trips annually
International: Less than 5%



"I just want everything to go smoothly. If there are any issues, I want to be able to speak to someone who can solve the issues quickly."

Gender: Female
Age: 24
Travel Intensity: 2 to 3 trips annually
International: Less than 5%



"It's tiring but I'm enjoying it. I don't see any real big challenges."

Gender: Male
Age: 29
Travel Intensity: 6 to 10 trips annually
International: 21% to 30%



"The biggest challenge I face when traveling for business is the restrictions placed on me in terms of with whom I can book from where I can stay and how I can get around while I'm on the trip. If corporate was more lenient and flexible with booking arrangements, not only could they save time and money but also it would be more convenient for all parties involved."

Gender: Female
Age: 49
Travel Intensity: 11+ trips annually
International: 21% to 30%



"The biggest challenge is spending time away from the family. In terms of business, the biggest challenge is expenses that come up unexpectedly."

Gender: Male
Age: 35
Travel Intensity: 11+ trips annually
International: Less than 5%



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KEY TRENDS: THE BUSINESS TRAVELER PERSPECTIVE

The following high-impact factors trended across BTN’s survey sample. Some have been long-standing challenges, but others may be intensifying in the post-pandemic work environment.

Expense Reporting – The perennial pain point of expense reporting landed in the top spot as travelers’ overall most critical concern when it comes to business travel. Efficiently and effectively getting reimbursed for out-of-pocket spending may always surface as a primary concern. More companies, even in the U.S., are moving away from individual bill/individual pay corporate cards and going to a central pay configuration—sometimes to address concerns about the inequity of assuming a highly paid employee will front the liability and eventual cost of, say, an airline ticket prior to reimbursement, as opposed to other realities of highly or moderately paid employees having other obligations for their personal funds.

Curtailing Risk – According to BTN’s Travel Experience Index, business travelers ranked duty of care around such risks as severe weather, political unrest, personal safety risk and lingering concerns around Covid or other disease spread as their third-highest priority among the 22 pre-trip, on-trip and post-trip experience factors in the survey. For several profile types, duty of care jumped higher on their lists. Young business travelers ranked duty of care third in their priorities; for road warriors taking 11 or more trips annually it was second; and for heavy international travelers that concern rose to No. 1. The latter two groups also showed significantly higher levels of concern on the scale of 1 to 5 than other groups.

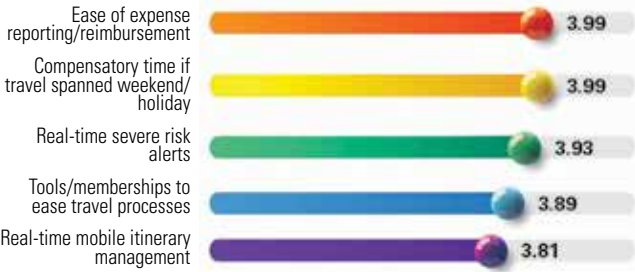
Blended Travel – That’s not to say employees don’t want to travel—they do. Many want to

5 TRAVEL PRIORITIES

Traveler Type: Male



Experience Differentiator: Overall travel process support



Male travelers in BTN’s Traveler Experience Index survey had a strong bias towards travel process improvement. Like many travelers in the survey, this group prioritizes efficient expense reporting and reimbursement but equally valued compensatory time for work-related travel that impinged on their personal pursuits during weekends or holidays. They value severe risk advisories that can help them either plan for realities on the ground in their destination market or react to events that may be unfolding and will impact their trips. On-journey support from tools and memberships that allow them to bypass queues at immigration, customs, security, hotel front desks, car rental counters and other “productivity blockers” would impact their travel program satisfaction levels.



Experience Differentiator: Support her wanderlust

Traveler Type: Female



Like their male colleagues, female business travelers in BTN’s survey prioritized efficient expense reporting and reimbursement. Jumping very close to the top of their impact factors, however, is the desire for blended trip policies and in-destination recommendations for personal travel or client entertainment. This group showed the most inclination for this trend, but they were certainly not the only group that pushed this priority. A notable absence from the list was importance of support for personal safety or advisories on severe risks. Sliding in just beneath their desire for personal enrichment as part of their business travel schedules, BTN’s female survey participants skewed toward practical and tactical priorities: They want reliability in the supplier set; they want to understand the objectives of the trip so they can focus on success; and they want reliable, in-policy access to internet connections that will keep them productive.



Experience Differentiator: Empower them with a mobile pocket guide for business travel

Traveler Type: Infrequent 1 or 2 trips annually



Compared to other traveler profiles BTN defined, experience factors were less important to infrequent travelers overall. When they do need to travel, they want to know the objective of the trip and they want a pocket travel guide to help get them from place to place without agita, even—and perhaps especially—if they are not familiar with common travel processes or company policies. The latter may incline them more toward independent decision-making, but they want confidence that their companies will reimburse reasonable decisions made in real time. Infrequent travelers are less concerned with travel risks than other groups—they are clearly less exposed to them. What are the chances something will happen to them while on the road for business? Best to ensure all travelers have quality duty of care alerts, whether they care much about them or not.

travel more, at least insofar as they want to leverage work trips as jumping off points for leisure travel. Doing so saves them time, money and is lighter on the environment—though, in truth, sustainable travel came dead last on the priority list for every traveler group. Be that as it may, business travelers voiced in BTN’s survey the importance of blended travel to their overall work-life balance and the desire for their companies to support those priorities with defined policies, sources for recommendations and potentially supplier-extended rates and deals

Compensatory Time – Perhaps to that same goal of work-life balance but emerging in a different formulation, business travelers highly valued compensatory time if business trips spanned a weekend or holiday, time spent on leisure pursuits or with family. More than a handful of survey respondents offered open-ended comments that the biggest challenge associated with business travel was the “time spent away from my family.” To sacrifice that on weekends and holidays as well as workdays, they felt, deserved acknowledgement and flexibility from their employers. While that may not fall entirely under the purview of the travel manager, it may be a discussion point between travel and human resources regarding what is possible with company policies versus individual managerial discretion, which by definition is applied unevenly across the workforce.

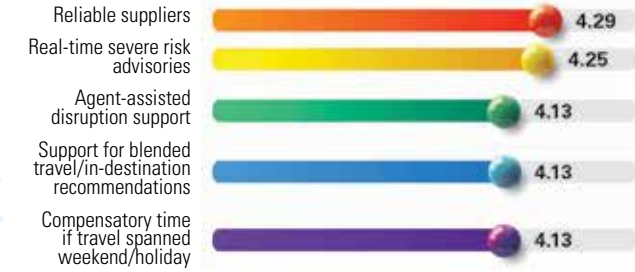
Reliable Suppliers – Somewhat surprisingly, the choice of reliable suppliers in the booking tool or through the corporate agency did not rank as travelers’ highest concern. But it was up there with the big issues. Travel managers told BTN that supplier reliability and the ability of travel management companies to support travelers had been a major stumbling block for programs in the preceding months. They spoke of the need to educate busi-

5 TRAVEL PRIORITIES

Traveler Type: Road Warrior 11+ trips annually



Experience Differentiator: Provide human support for travelers most impacted by disruption (also, support their wanderlust!)

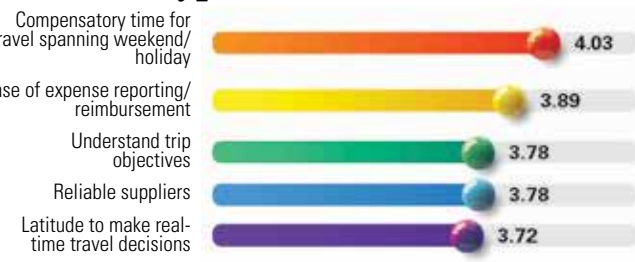


It not surprising that employees with intensive travel calendars tend to be more passionate about traveler support overall. Each of their top travel priorities earned more than four points on BTN’s 1 to 5 rating scale. These employees highly value the reliable suppliers that provide the products and services that are going to get them to their meetings, in front of customers and making deals. That’s what it’s all about. They also want to know about risks that could compromise their success and if either of those top two priorities fail, they want access to a person who can mitigate the situation. Aside from those goal-oriented priorities, road warriors are looking for me-time. Support for blended travel policies and in-destination recommendations as well as the latitude to reclaim their holidays and weekends poached by work trips both earned “importance” scores of more than four points. It looks like these travelers have expense reporting mastered—or they may already have executive support for it.

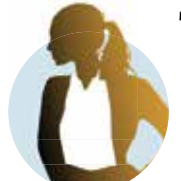


Experience Differentiator: Acknowledge the personal sacrifices of business travel; offer virtual alternatives

Traveler Type: Domestic u.s. only

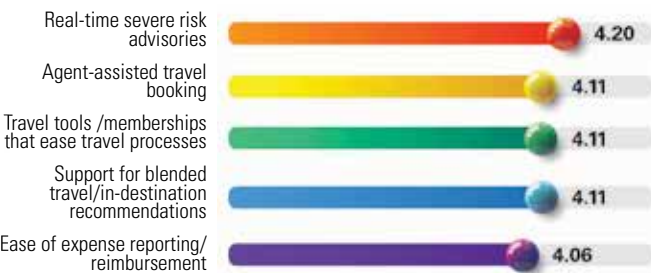


BTN defined domestic travelers in this sample as having zero percent of their trips as international long-haul. With the exception of their concern for reclaiming their weekend and holiday time from trips that strayed into the “me”-zone, their focus on travel experience was not as passionate as road warriors or their more jet-setting international colleagues. Their interests hewed close to travel fundamentals: having reliable suppliers and understanding trip objectives. Not seen on this chart, however, was their sixth priority that scored just hundredths of a point from being in the top five: If they deemed the trip as unnecessary or inconvenient for personal or business reasons, they wanted virtual options presented to them prior to engaging in the trip planning and booking process.



Experience Differentiator: Offer human support for complex international bookings (also, support their wanderlust!)

Traveler Type: Frequent Intl. 50% or more long haul int’l



Frequent international travelers, on the other hand, returned to the theme of risk advisories to help them understand their personal safety. Due to the often complex nature of international bookings—which were made more complicated with changing restrictions coming out of the pandemic—these travelers are still looking to lean on travel agents for some of that itinerary building and booking work. Long lines at immigration have plagued airports, particularly in Europe, and international travelers have felt that pain. They are looking for their organizations to mitigate it where the travel program can, with memberships and tools that allow them to bypass the incessant queuing. International travelers have developed a taste for leisure options in and beyond their business destinations. Like road warriors, they are looking for blended travel support from their travel programs; indeed, there was considerable overlap between the heavy international and the road warrior population in BTN’s survey; thus, the similarly passionate levels of their feelings regarding travel and travel support structures.

ness travelers about new realities, but survey results pulled in April show travelers may be getting the message. That said, gaps in supplier performance across air, hotel and ground transportation was another common theme in the survey's open feedback segment, as was the imbalance of the financial outlay for the level of service business travelers are receiving across the ecosystem.

INTERPRETING IMPORTANCE RATINGS & TRENDS

Business travelers aren't travel managers, and bringing travel expertise into the data analysis picture is an important piece of bringing value to the travel program and to travelers themselves. It might be tempting to take the results of BTN's Traveler Experience Index—or, indeed, your own company's results from the survey if you choose to deploy it—at face value and strive to match certain traveler priorities one-to-one with services or tools. And there may be certain areas where that is clearly the solution—matching heavy international travelers with additional human support services for booking complex itineraries would be one obvious example. Bringing more automation to manual expense reporting processes would be another. There are certainly more.

One-to-one solutions aside, travel managers should also consider travelers' "importance factors" through the lens of innovation opportunities, where there may be an unexpected alternative to meet a need that doesn't have an obvious solution. These are jumping off points for discussion with travel management company partners and, certainly, travelers themselves to see how new or existing technologies and services might improve the traveler experience—or, indeed, if there is education to be done around the services and support the travel program already provides.

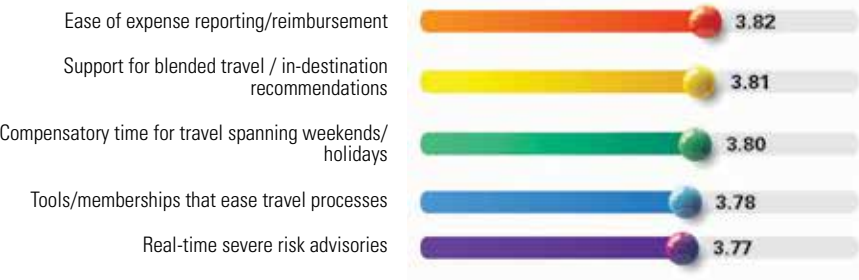
The Generational Divide: It Isn't So Wide After All

No matter what generation you call your own, no one likes messing with clunky expense reporting processes. Travel and expense managers should figure out this process—and look at automated platforms that offer machine learning-assisted mobile tools. Every age bracket put the need for risk advisories among their top five priorities, but younger travelers wanted more prominent personal security structures than other age groups. As young travelers expand their horizons, it looks like they develop a taste for adventure. Age 25 to 34 year olds prioritize blended travel experiences and are looking for their companies to support their wanderlust. Age 35 to 49 year olds may find themselves with families to consider—note the importance of virtual options to fall back on when they need the choice not to travel. The over-50 set wants reliable suppliers, smooth processes and the latitude to make real-time decisions about travel. After all, they've been at this game a while.

Traveler Age Bracket: Younger than 25



Traveler Age Bracket: 25 to 34



Traveler Age Bracket: 35 to 49



Traveler Age Bracket: 50+



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CULTURAL SIGNALS

Can a travel program really deliver cultural value to an organization?

BY ANGELIQUE PLATAS & ELIZABETH WEST

American Express Global Business Travel since 2021 has messaged that business travel had the potential to become the linchpin of modern company culture. The argument was that in a broadly diffuse workforce—driven away from centralized corporate offices by the pandemic—travel itself could serve as the connective tissue that not only would bring people together but also could deliver a sense of purpose and serve as a critical touchpoint to corporate culture, collaboration and productivity.

A report published last March in collaboration with cultural insights and strategy firm Cultique outlined five areas where the mega travel management company believed travel programs would drive value in a remote-work world: company culture, worker well-being, professional development, employee empowerment and corporate values.

Flash forward to 2023 and the huge push to bring workers back to the office—Amazon, Apple, J.P. Morgan, Goldman Sachs, Salesforce, all included. Will this back-to-office mentality undermine the potential for travel to play a central cultural role in the organization?

Amex GBT Meetings and Events VP Linda McNairy posits that it's not just offsite gatherings for remote workers that are changing the culture of travel; it's travel's position as a requirement and fabric of the corporation.

"Organizations are realizing that as they ask employees to come back to the office, they are having to attract them there," said McNairy. "Something similar is happening with travel. There was an older corporate culture of just accepting every policy: 'It's my employer, I have to do this'-type of mentality. Now people are saying, 'I do have a voice in what matters to me,' and organizations are listening. They acknowledge that travel can be part of that work-life trade-off that has become so important; that travel opportunities—and the personal and career development travel offers—can help balance out that back-to-office equation."

TRAVEL PROGRAMS AS AN EXTENSION OF THE WORKPLACE

According to BTN's Traveler Experience Index survey, 83 percent of travelers said business travel was "important" or "very important" to the success of their current jobs. To McNairy's point, 84 percent of respondents said business travel was "important" or "very important" to their job satisfaction.

Given that overwhelming perception of travel's value as an enabler of productivity and success, the idea that a travel program serves as an extension of a supportive workplace isn't a huge leap. As such, there's an argument to be made that travel should integrate more seamlessly with human resources, technology and facilities management as departments that drive work enablement.

Yet, a number of travel managers during a World Travel, Inc. event in Philadelphia in April noted that those aspects of their travel programs don't get as much play as they should—and neither do travelers themselves.

One corporate travel and expense supervisor at a publicly traded corporation based in Massachusetts confessed that travel policy and program ownership at the 14,000-employee company had bounced around in recent years from procurement to finance and to a blend of the two before landing in its current position with executive sourcing, which the buyer indicated was still an awkward fit.

"It still feels like travelers are in the backseat; we need to get them top of mind—they need some visibility," the travel buyer said.

Other buyers in attendance identified with the lack of departmental ownership for travel strategy, and also bemoaned the reality that productivity enablement had not yet caught up with travelers' actual needs.

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THINKING BEYOND TRAVEL

Positioning a travel program within corporate culture requires a bigger-picture lens than cost control. Rather than thinking about “business travelers” in vacuum, a corporate culture perspective forces travel stakeholders across all departments to consider travelers as employees first and understand their productivity needs—wherever they are.

“[We need to] make sure employees have the best experience when they are working in our offices, traveling on behalf of the company or traveling to other offices,” said Takeda global head of travel, meetings, fleet and aviation Michelle DeCosta, whose bigger-picture lens is supported by a reporting structure that roles up into both global real estate facilities and procurement.

“Things like [having] a universal office security badge—no matter what office you go to, your badge works or can be turned on to work. Or, ensuring simple accommodations like multi-pronged electrical outlets in international offices can make travel for work just a little more productive,” she added.

This holistic view of end-to-end employee enablement for what DeCosta described as Takeda’s “highly mobile” workplace has motivated new structures and technologies for the company’s travel program, not just for facilities concerns.

“One of our internal key performance indicators this year was around improving the workplace experience for employees while they’re in the office or traveling. So it is something that’s always top of mind,” she said.

The company has transitioned over the past three years to a consolidated global program with BCD Travel to equalize traveler service levels and provide data consistency for management, including traveler safety and duty of care. Aligning with its declared KPI, the company has put more emphasis on enriching the travel experience: first, by integrating traveler education and Takeda corporate values into the booking path and then extending that support system through the travel journey.

DeCosta has leaned into Tripkicks, a self-described corporate travel experience enhancement provider available in SAP Concur’s App Center and within the BCD Travel Marketplace. The program layer embeds detailed messaging at the point of sale that helps identify and recommend program-preferred flights and hotels, and offers insights into the negotiated amenities the traveler will receive when booking them. Tripkicks also supports traveler education on international travel documentation requirements as well as traveler safety and risk evaluations. It has a growing list of data partners that brings new information streams to the table.

Takeda, a Japanese company that promotes a culture of sustainability and well-being, uses TripKicks to promote sustainable travel choices. “It’s a layer in the


“One of our internal key performance indicators this year was around improving the workplace experience for employees while they’re in the office or traveling. So it is something that’s always top of mind.”

— TAKEDA'S
MICHELLE
DECOSTA

booking tool that helps our travelers choose sustainable flights and hotels,” said DeCosta. TripKicks integrates flight emissions calculations at the point of sale that account for the type of aircraft and seat class to guide sustainable choices. It also focuses travelers on properties close to public transit and within walking distance to Takeda offices—a strategy that saves carbon as well as ground transportation costs.

This ethos also rolls into workplace sites, which offer healthy catering choices to employee travelers along with onsite gyms. DeCosta has worked with Takeda’s well-being lead, who also reports through facilities, to produce a traveler tip sheet about staying healthy on the road. The Thrive corporate wellness program promotes well-being and mental health to Takeda’s traveling population and beyond.

DeCosta added that Takeda’s diversity, equity and inclusion efforts have included working with minority-owned suppliers, and the pharma company’s travel program has customized TripKicks to include an icon for those options within the booking system as well. “I know we are the first company to use this,” she said. “I don’t know if it’s been rolled out to others.”

For guidance on the road, Takeda has invested in Emburse’s Roadmap app, a kind of app “envelope” that serves as a one-stop resource for numerous corporate travel functionalities.

“Within the app is everything a Takeda traveler needs to know, whether traveling to one of our offices or managing an itinerary to an offsite location,” said DeCosta. The app integrates itinerary data and information resources to deliver itinerary management and messaging that alerts travelers to current travel conditions along their route combined with custom-

ized messaging from Takeda to help facilitate in-policy journeys.

WHAT TRAVELERS WANT:
A POLICY ANALYSIS

From the standpoint of employee enablement and as a reflection of corporate culture and values, DeCosta’s program at Takeda is among the elite. One might wonder what else travelers could want from a travel program.

Amex GBT has attempted to figure that out in the context of travel policy strategy, as an evolution of last year’s collaborative report with Cultique.

The TMC last month published the results of a September and October 2022 survey collaboration with The Quorum that tested seven policy strategies—blended trips, personal travel extensions,

personal amenities, supplier choice, supplier diversity, colleague recommendations and sustainability—with nearly 3,000 employees and more than 2,000 employers to understand what each group wanted from a travel policy perspective.

Sixty-one percent of employee respondents said they want to bring family or significant others on blended trips, while 60 percent want to add a personal trip to their business trip and 54 percent want amenities to help recharge.

Employees were less concerned—but still interested—in more traditional travel program fundamentals.

Forty-one percent of employees said they saw the advantages of accessing a wider choice of suppliers on booking tools and 40 percent wanted “more diverse suppliers” in the supply chain. Further down on the employee priority list, 28 percent wanted a company channel to share travel tips with colleagues and 22 percent want fewer but longer trips to reduce carbon emissions.

While travel policies around blended or personal travel may not tie directly to company culture or values, they may position an organization to recruit or retain employees, especially in high-demand industries and



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a tight labor market. (Read more on this trend and companies deploying relevant strategies on page 28). When it comes to personal amenities or allowances that give travelers a chance to recharge while traveling, that is more common, likely because some of those perks and amenities can be negotiated into the buyer-supplier deal, said GoldSpring Consulting partner Neil Hammond.

Depending on the company’s overarching priorities—and, let’s face it, the travel buyer’s own compensation and incentive structures will come influence the outcomes here, DeCosta’s motivation internal KPI is a perfect example of this in action—the travel buyer has room to “play with some of the value at stake,” within the travel program, Hammond said. Those priorities determine “whether you put [negotiations] into direct cost savings or whether you’re going to put it into status matches and perks and other kind of things for travelers.”

To that end, reimbursable items will be the most convenient for travelers and the most cost-effective for organizations to negotiate when building the program, Hammond said. As an example, making the case for amenities like airport lounge access for frequent

COLLABORATION MEETINGS

“I can tell you, definitely, that small meetings have had a huge comeback,” said HRS CEO Tobias Ragge, whose company handles hotel sourcing, booking and payment solutions, including a small meetings technology platform. “We have seen the numbers in this area going through the roof. Some of that is pent-up demand, but it’s also a function of the new remote-work reality.”

While companies may look to mitigate such meetings in a return-to-office environment, Ragge said he doesn’t see signs of a slowdown anytime soon.

Cultique co-founder Sarah Unger thinks a slowdown could be a mistake, anyway. Employees have come to value that offsite experience—when it’s done right. “People are so drawn to travel, but it has to be set up properly so it’s not always a grind.”

Collaboration meetings are more than an opportunity to sit 9-to-5 in a windowless room in heads-down meetings, she said. “Travel is an important connective tissue in a workplace that is hybridized or distributed. Travel activities at offsites [are now] structured to reflect more wellness and teambuilding. [There is more] drive and demand for dialogue-based meetings and interactions where you can really establish the personal connection between employees.”



“Senior employees or managers set a precedent saying, ‘It’s OK to use this policy that we set in place for everybody’s well-being’ by walking the walk or modeling strong behavior in company culture. Normalizing things really goes far in helping people actually adopt them.”

—ULTIQUE’S SARAH UNGER

travelers as a trade-off for meals purchased time and again at expensive airport locations. That begins to make business sense at a certain point; it’s the policy-maker’s choice to figure out when and whether to consider the productivity standpoint of disruption mitigation against delivering on the trip objectives and enabling travelers to work comfortably amid in-transit challenges.

Hammond said company culture determines how far travel policy is willing to go in those areas, but there has been an overall shift in the tight labor market toward more flexibility, “giving [travelers] a little bit more license to do what they want.”

That said, there are ways to create strong programs with room for wellness and flexibility that empowers travelers.

“Sometimes, it’s the look and feel of how the policy is written, but also the content and the way it’s worded,” Hammond said. It’s often “reflected in how the policy enforcement part [is written] and how we’re making travelers comply.” Draconian rules or broad traveler concern over non-reimbursement when faced with an on-trip decision probably aren’t the best drivers of empowered corporate cultures.

Whatever level is right for the company, both employees and employers in the survey strongly agreed that moving toward more flexible, empowered travel policies that incorporate a clear awareness of a modern mobile workforce would make the company “a happier place to work,” “more competitive,” and financially “more successful.”

SENDING THE RIGHT SIGNALS

It’s easier said than done, though. Aligning with corporate culture and driving employee experience through the travel program can be an all-hands-on-deck situa-

tion, involving everyone from the executive level down.

But, Cultique co-founder Linda Ong told BTN, “Corporate travel managers have a much more critical role in the organization than just being people who manage expenses. They really can set the policies that can affect the internal culture of a company.”

How companies deliver the culture, policy and enablement message to travelers matters just as much as setting and implementing those program foundations in the first place.

Embedding the policy and messaging into travel technologies and processes certainly is the most ideal, but not every travel program will have the latitude or investment dollars to digitize that experience. There are plenty of other ways, including partner-

ships with HR and positioning the travel program as a benefit in the employee onboarding process—with the caveat, naturally, that the benefits all come to those employees who comply with policies and program processes.

Perhaps the most visible signal of corporate culture—and the value the travel program brings to those who use it—is the prominent example set by organizational leaders, said Cultique co-founder Sarah Unger. Especially when it comes to driving cultural change within the travel program, and encouraging employees to use the benefits that are being provided.

“Senior employees or managers [need to] set a precedent saying, ‘It’s OK to use this policy that we set in place for everybody’s well-being’ by walking the walk or modeling strong behavior in company culture,” she said. “Normalizing things really goes far in helping people actually adopt them, because you don’t want to create a travel benefit that no one knows about or people feel uncomfortable using because they don’t see it in action.”

Indeed, to offer a travel benefit that no one is able to use begs the question of whether the travel program is conveying company culture—or just a cultural myth. ■

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WHAT IS THE MEASURE OF TRAVEL EXPERIENCE?

How can buyers quantify the business travel experience in order to improve it? It's a tough calculation, but the industry is working toward solutions.

BY MARK FRARY & ELIZABETH WEST

“It’s not just about cost. Cost is important to our organization, but we do need to take into account other things,” said Nanette Sorensen, global travel manager of The Church of Jesus Christ of Latter-day Saints.

That’s not an unusual statement coming from a travel manager. Building, executing and managing a travel program must balance cost with service, reliability and effectiveness. But LDS—as the church is called for short— a few years ago created an airline metric to account for that balance and inform how it sources, contracts and manages changes with its preferred suppliers. They call it “quality cost per mile.”

That metric includes easily quantifiable data related to airline relationship quality, such as on-time performance, cancellation percentages and baggage-handling performance. But it also includes qualitative elements like how effective a carrier’s sales team and account reps are in providing reporting and responding to needs. How well does an airline handle rebooking in emergency situations? What sort of benefits does it offer travelers?

These relationship pieces are critical to supporting LDS, given its program mission, unique travel markets and the profile of its travelers. The church claimed more than 62,000 missionaries in 2022 who serve around the world.

“When you have the number of travelers we do, and 80 percent of them are 18 and 19 years old, they can encounter some problems along the way,” said Sorensen.

To minimize mishaps, the Church focuses its metric on operational excellence, but the qualitative pieces go further to account for those “beyond contract” activities that can make or break the travel experience. “We need an account rep who is very proactive. When you are in a crisis, you really need a partner or a vendor to help you through that,” Sorensen added.

Unfortunately, the entire airline industry changed at the same time, thanks to Covid-19, sidelining the effectiveness of the quality cost per mile metric, though LDS still had active travelers throughout the pandemic.

“[Covid] really disrupted our metric. So for the past couple of years we haven’t

paid a lot of attention to it because we were just trying to get our program and moving back to [pre-pandemic] levels,” said Sorensen.

Now that travel levels are back for LDS, its “experience” metric is coming back into play as the church plans a global air request-for-proposals process this year “to reset everything,” said Sorensen. As before the pandemic, LDS will use the metric for ongoing supplier management. LDS tracks the supporting data for the metric to determine “periodically, if something changed with a particular partner,”leveraging it to offer feedback on account management quality or changes in reliability.

NAVIGATING SUPPLIERS’ “NOW NORMAL”

In the current travel environment, the LDS quality cost per mile metric may be in for an extensive workout. Air travel disruptions have made headlines over the past year, sometimes the fault of carrier staffing practices and chronic shortages, as when Southwest flights experienced massive delays and cancellations amid storms late last year, but also due to bigger-picture issues like the Federal Aviation Administration system outage that grounded all planes in the U.S. in early January and still is under investigation. A series of worker actions and strikes in Europe have affected markets like France and Germany, with ripple effects extending to other markets. Numerous aviation administrations—including in the U.S.—have leaned on carriers to reduce their flight schedules over certain periods to mitigate the issues.

And it’s not just airlines. Worker actions and staffing shortages have confounded corporate travelers across the travel ecosystem, including public transit systems. According to the American Hotel & Lodging Association, staff shortages still impact the business operations of nearly a quarter of hotels in the U.S.

Veteran buyer Carol McDowell-Schrager, who recently took a new position as global travel manager for T. Rowe Price, told BTN that while she’s not ready to call this situation the “new

normal,” travel managers will have to work with suppliers to navigate what she calls the “now normal” in terms of reliability and service, which she predicts will improve over time.

“We need to understand from our suppliers what we can expect, and at that point possibly alter the way our agreements are in place,” she said. For example, on-time performance and cancellations on key routes may affect the ability to shift share to a potential partner. These conversations could be critical, with reliability key to driving traveler experience.

But McDowell-Schrager also underscored the program allowances companies might need to consider in today’s environment. “There are ways we can shift the program to make it better for our travelers, but we also have to educate them about these realities and act as an advisor for them,” she said. “If they need to be in place for an important meeting, traveling the day before may now be a necessity, where it may not have been part of the company’s practices or policy before.”

Suzanne Boyan isn’t limiting her conversation to the supplier side. The global meetings and travel manager for Chicago-based management consulting and technology firm ZS actively engages travelers to understand their pain points and get feedback on supplier performance.

“The only way to get to really quantify how happy your travelers are is to engage in conversations with them,” said Boyan. “I don’t want to hear that only from suppliers. It’s not that I don’t trust them to give me feedback; it’s that the people who are the most affected are truly the travelers, and they’re the most important part of my program.”

NUDGING TRAVELERS TOWARD HIGH PERFORMERS

Scott Gillespie, founder and CEO of travel consultancy tClara, has done considerable work on traveler experience metrics. He said that while many traveler experience advocates have such metrics as quality cost per mile and use traveler feedback for supplier sourcing and management exercises, there is an argument that such information should be made available to the traveler at the point of booking.

“You want your travelers to have visibility of the relevant scores,” he said.

One technology company that has offered this is TripKicks, via a booking tool overlay that offers insights into supplier performance, cleanliness and reliability. Bringing that knowledge to the point of sale can impart more trust in the booking tools and nudge travelers toward the most reliable airline or hotel experience for a particular trip.

Tripbam is another third-party technology company that has taken on trust assurance as part of its value proposition. A partnership with hotel guest feedback platform TrustYou allows the hotel reshopping, sourcing and auditing platform to provide summarized review content and what it calls a TrustScore—an independent rating calculated from all verified online reviews worldwide. The system is being used by corporates to assure travelers that when they are requested to switch their originally booked hotel, the new recommendation is a worthy alternative.

On the supplier management side, Tripbam enables travel

buyers to set TrustScore thresholds for the properties included in their programs, communicate with those properties when they fall beneath the threshold and giving users the insights to deactivate chronic low-performers.

BENCHMARKING EXPERIENCE

Perhaps counterintuitively for travel buyers, Gillespie believes experience metrics may be best tracked, managed and communicated by suppliers.

“I’d like to see suppliers get a deeper understanding of how their service offering affects the traveler on more subjective well-being dimensions and then report that to the corporate with averages for their travelers and a benchmark for all of their corporate customers,” he said.

He predicted one major supplier this summer will come out with travel friction reporting for their corporate customers, without specifying whether this supplier would be a travel management company, airline or other service provider. Regardless, his view is that such reporting should focus on six “fuzzier” aspects of the travel experience—safety, health, productivity, overall comfort, stress levels and sleep.

Corporate Travel Management has already launched such a benchmarking solution in its local Australia and New Zealand markets. The widget analyzes such factors as trip lengths, weekend trips, overnight flights, time zone changes and last-minute travel to determine a well-being score for each traveler on a scale of one to 100.

It doesn’t incorporate travel disruption and recovery in that equation; perhaps Gillespie’s predicted evolution of such a tool will dig deeper.

“Traveler experience is an issue that’s really important to every supplier, so I’d advocate for keeping it with the supplier,” Gillespie said. “It means more surveys, and we’re all survey-fatigued, but it’s so important for the supplier to know and own that data and then be able to impartially report the data to their to their corporate customers.” ■



“The only way to get to really quantify how happy your travelers are is to engage in conversations with them.”

— ZS’S SUZANNE BOYAN

STOP CHASING THE LEISURE EXPERIENCE

Managed corporate travel has different objectives and requirements than leisure. Travel managers have more options than ever to define their company's corporate travel experience through technology choices.

BY MICHAEL B. BAKER

The proliferation of corporate travel technology is opening doors in improving the business traveler experience throughout the journey—easy access to personalized content, increasing options in self- and automated service and enhanced collaboration with colleagues, to name a few—although a few of those doors could be opening into dead-end paths.

Technology is ironing out the seams in the traveler experience. The danger, however, is pressing things too flat to remove the unique aspects of business travel.

CHASING A CONSUMER-GRADE EXPERIENCE

Over the years, much of the focus on travel management technology has centered around booking tools, and for good reason. While it's the key entry point to ensure travelers are booking in compliance and that companies have the data to track their travelers and program activity, challenging or confusing booking experiences push travelers to find a reason to do their bookings elsewhere. As such, much of the development and marketing around corporate booking tools has sought to emphasize bringing a more consumer-like experience to the tools, mimicking the experience travelers have when booking for their leisure travel.

Ultimately, that will always be an uphill battle, AmTrav CEO Jeff Klee said.

"The reality is that we, as TMCs and arranged travel providers, are asking companies to use a service that can provide a lot of great things—visibility, control and duty of care—but we're really also asking, and how severe this ask is depends on what booking tool they're using, for the travelers to make a sacrifice," he said. "There is no corporate booking tool, including our own, that is as good of an experience as what they get from the supplier.com site."

Suppliers, eager to enhance their share of direct bookings that in turn cuts their distribution costs and gives them more data about travelers using their services, have invested and continue to invest heavily in their own direct portals, so it's difficult for third-party tools to keep pace, Klee said.

Solutions have arisen to capture those direct bookings, such as Concur's TripLink and Traxo, which can scrape companies' email servers to find confirmation emails of direct bookings to bring them into the managed realm, allowing those to be a bigger part of the corporate traveler experience.

Chicago-based management consultant and technology firm ZS has followed this path, enabling its employees to book direct, through a traditional TMC or an online booking tool in its "omnichannel" program. Global meetings and travel manager Suzanne Boyan has been a trailblazer in her efforts to offer a spectrum of booking options for ZS's 2,000 regular travelers. She uses Traxo to sweep up bookings made outside the TMC and OBT channels, while still connecting them to key duty-of-care and managed program support.

"Our program is less 'you must book in this very traditional way' and more 'I want you to book in a way that makes you happy and productive as long as I get the data,'" Boyan said, noting the approach supports ZS culture of cost stewardship but also trust. Her job, she said, is to offer the travel platforms that enable good decision-making, provide a seamless experience for employees but "first and foremost," she said, "is having the technology in place to track traveler experience."

Boyan represents a growing minority of travel managers looking for viable alternatives to the narrow lanes traditionally defined by corporate travel technology. Yet Cheryl Benjamin, North American travel and expense manager for Gordon Food Service, said the alternatives enabling direct and omnichannel booking strategies come with their own challenges. Traxo, for example, adds an additional expense, and TripLink is challenged to cover global needs, she said.

She has seen progress in improved traveler experience from OBTs, she said. Hotels, in particular, have done a good job in getting "members only" content into the tools, as well as promotional rates for car rental suppliers, that boost the experience for travelers.

But when it comes to expecting an OBT to deliver the same experience as a direct or consumer-focused site, she has a viewpoint similar to Klee's.

"We're not ever going to have that type of service," Benjamin said. "With online booking tools, trying to service the needs of travelers within policy, you have to lose something."

Klee said no OBT has yet matched airline apps in overall ease with servicing, quickly and easily making changes to an itinerary, but many are working to close the gaps. For AmTrav, that has included ensuring that travelers are able to reserve extra legroom seats through the booking tool, for example, rather than having to do it with the airline later.

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TRAVEL CONTENT TRANSFORMATION

Content remains a key challenge in corporate booking. Travelers who feel like they can find better deals outside of their tool will be frustrated and less likely to want to use it.

The International Air Transport Association's New Distribution Capability standard has added a new wrinkle to the content challenge. At its core, the NDC standard is meant to provide airlines a way to distribute personalized content to travelers and sell ancillaries—extra-legroom seats, Wi-Fi, baggage space—just as they would through their own channels but via third-party providers. As different players in the distribution chain are at varying levels of adoption, however, it's currently presenting new challenges with some airlines opting to distribute certain content only through NDC channels and NDC bookings not always as easily serviced by TMCs.

"One could argue that NDC is trying to change the booking experience, but it's opening up a whole new can of worms," Benjamin said. "As far as the servicing issues, does that hurt the traveler experience on the corporate side? There's work to be done."

In the end, NDC stands to unlock travel experience enhancement that previously was impossible through booking tools because the retailing content wasn't there, Klee said.

"The holy grail is being able to get everything you can get in the consumer experience but with things we are uniquely able to do, like comparison shopping for the entire trip and adding savings they are eligible for," he said. "For all the problems [NDC might introduce], with EDIFACT, we're stuck."

AI'S POTENTIAL AND LIMITATIONS

Airlines and travel technology suppliers often talk in general terms about NDC being the key to bringing a more consumer-like experience to corporate travel booking, but many also caution that, due to distinctive needs with business travel, mimicking the leisure experience too much could damage the managed corporate traveler experience.

Someone planning a leisure trip to Milan, for example, might be happy to scroll through hundreds of hotels trying to decide which one best fits their needs as they try to plan their overall experience, Tripism founder and CEO Adam Kerr said. Travel-

ers for business usually have a set purpose for their trip in mind already and want to reach relevant content to that purpose.

"In the design of the user experience, when it starts to become too consumer-ish, you lose some of that core functionality around being a business traveler," said Mike McCormick, who most recently was EVP of business development for Onriva. "You know where you're trying to go, and you might be trying to accomplish 10 different things, but you already have a sense of what you're doing and what your budget parameters are."

Several tech providers in recent years have sought to create tools that provide business travelers with only a few or even one option from a search that the tech itself determines—through machine-learning algorithms—is the best fit. Limiting visibility to that degree might not be ideal for the traveler experience.

For one, travelers might not yet be ready to trust fully the technology. Travelport's recent Modern Retailing report, which surveyed more than 2,000 respondents globally, showed that while a vast majority don't want to deal with too much choice, they are less trusting of personalized offers and by and large want to be able to cull those themselves. More than three-quarters said they'd "rather suffer the work of sorting choices than let the retailers choose for them," according to the report.

The technology might not have sufficient data to take all aspects of business travel into consideration as well.

"There's a certain reasoning level that technology doesn't have," Benjamin said. "I'm not saying you have to have an agent book everything, but if you have multiple commitments on a business trip, how does AI work with things that are more complex?"

Even so, AI in booking stands to improve the experience, as the Travelport study indicated consumers are more trusting of curated offers that come from vendors with whom they've had experience. Integrations are add-



"There is no corporate booking tool, including our own, that is as good of an experience as what travelers get from the supplier.com site."

—AMTRAV'S
JEFF KLEE

ing to the mix, such as a partnership between Microsoft and Amadeus to link booking with calendar and collaboration tech.

Spotnana VP of strategy and partnerships Johnny Thorsen said he is “pretty confident” Spotnana this year will have capabilities around the “repetitive trip environment.” If a traveler goes to New York six times per year and tends to take trips of a similar duration and stays in similar locations, it makes presenting the curated option simpler.

“We can only do that when we have a credible data story,” Thorsen said. “Is one trip enough? No. Is 10 enough? Yes. We are experimenting with AI, and as we go forward, we will find the balance.”

AI has potential to drastically change the business travel experience beyond booking, particularly on the servicing side as well. Still, chatbots and other automated servicing options are not fully equipped to replace live agent servicing.

In fact, Benjamin said her company’s decision to move from a large to a smaller, more regional TMC was driven in part by the ability of personal service driven by technology. Travelers have the ability to text and get a response instantly around the clock, she said, and that was the aspect that made the new TMC stand out in the RFP.

Emergent technology, such as ChatGPT has the capability to transform servicing to tackle more complex questions, but the Travelport study showed that travelers still prefer the human touch—especially younger consumers. The survey showed 83 percent of respondents from 18 to 41 wanted an option to chat with a live human, compared with 75 percent overall.

“Humans are here to stay, breathless articles on LinkedIn about ChatGPT notwithstanding,” according to the report. “Live chat was rated equally useful as a phone call, indicating that people just want a human experience, regardless of whether it’s voice or text.”

THIRD-PARTY TECH PROVIDERS SHIFT THE BALANCE

Takeda global head of travel, meetings and events Michelle DeCosta said her company has embarked on an “innovation exchange” that recently included bringing in online booking suppliers to do presentations and answer questions about how they can be a part of that journey. The company also has turned to a number of third-party partners to ensure travelers can easily access information throughout their travel experience. Takeda recently adopted Tripkicks as an overlay in the Concur booking tool to bring visibility and attention to sustainable travel and minority-owned travel partners, and to help influence traveler choices at the point of sale (see page 16).

Other third-party technology providers have arisen in recent years seeking to enhance the traveler experience in booking and beyond.

Grapevine, for example, uses AI, in partnership with TMCs, to get relevant offers in front of travelers that they can book within policy and managed parameters. In terms of the traveler’s experience, that adds the consideration of time as a dimension to the booking experience, Grapevine CEO Jack Dow said. A traveler might not yet be ready to think about

their hotel choice or airport parking when making an initial flight booking, for instance.

“The reality is, in any travel booking scenario, you never book it all at once,” he said. “There is a whole bunch of things you need to purchase as a part of your journey, and the attachment rates of those things should be significantly higher.”

Tripism, meanwhile, is tackling the communication side of the experience, offering technology that in essence replaces the traditional intranet site to bring “highly relevant information to travelers who don’t want to read thousands and thousands of words,” Kerr said. That can enhance the experience by ensuring travelers are informed of supplier partners and when making other decisions, such as accessing dining recommendations.

TMCs, of course, have been investing in their own tech to enhance the travel experience, including self-service capabilities, alerts and services to deal with disruptions and sustainability data, to name a few. So, how do travelers find the balance between that and third-party suppliers? Keeping in mind that expecting all technology from a single provider is “a really big ask,” according to Kerr.

Klee said AmTrav’s philosophy is to own as much of its own technology for the traveler experience as it can—a philosophy, he said, is validated by the struggles some TMCs currently are having with NDC.

“We don’t want a bunch of third parties we come dependent on; the more direct we can be with our suppliers, the better,” Klee said.

DeCosta, however, said buyers shouldn’t lose themselves as the center of the travel experience, relying too heavily on the TMC as the single tech partner to drive the travel experience.

“For too long, as buyers, we’ve put [it] on the TMC to manage everything that happens,” DeCosta said. “The TMC remains an important partner, but we want to put Takeda at the center of the ecosystem.” ■

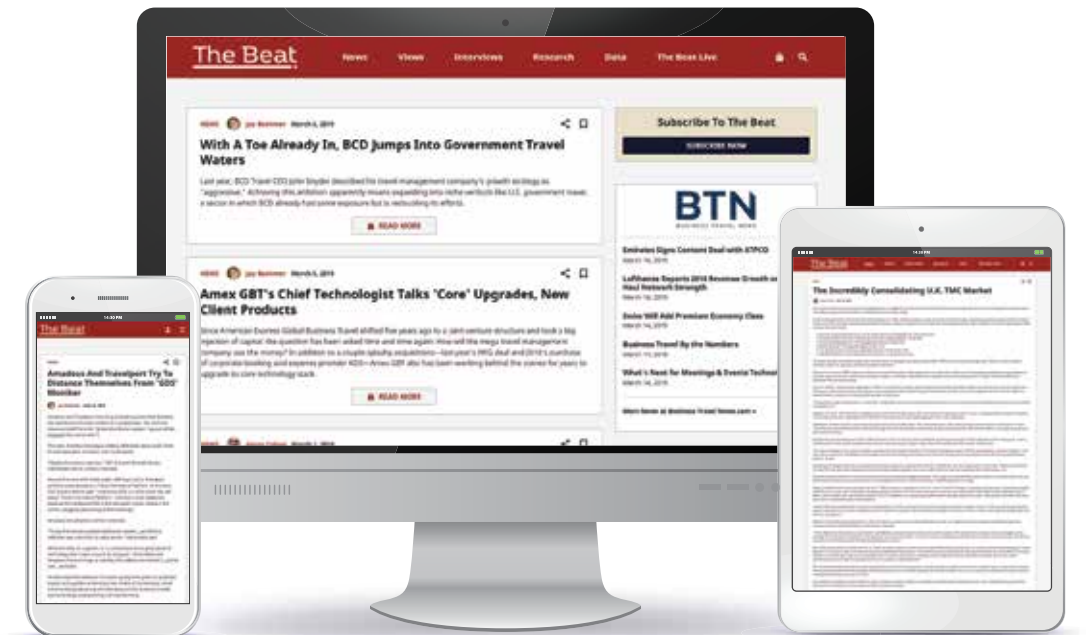


“Our program is less ‘you must book in this very traditional way’ and more ‘I want you to book in a way that makes you happy and productive as long as I get the data.’”

— ZS’S SUZANNE BOYAN

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BLENDING OPPORTUNITY?

By all accounts, travelers are increasingly mixing business and leisure. Could incorporating leisure travel into managed programs enhance the experience?

BY LAUREN ARENA

Combining business and leisure travel is not a new phenomenon—we were gifted the portmanteau ‘bleisure’ back in 2009—but in the post-pandemic era of remote work and travel-starved employees seeking greater work-life balance, bleisure travel has been given a new lease on life.

A 2022 industry poll conducted by the Global Business Travel Association found that two in five travel managers (41 percent) reported an increase in the desire for blended or bleisure travel among employees.

The association estimates that in 2022 blended travel had a market value of \$497.5 billion and insists that providing support for bleisure travel can be an important tool in attracting and retaining talent.

What does this mean for travel managers? And is there value in thinking beyond business travel for a managed travel program?

Salesforce senior director of global travel Dorian Stonie is a long-time believer in the value of bleisure and has integrated leisure travel as part of the software company’s managed travel program “from day one.”

“We wanted to leverage not just our corporate travel spend, but all the travel activity within our community ... so we started partnering with our suppliers on how to extend discounts, benefits and services to the personal side of travel,” he explained.

Stonie said the added leisure volume “makes us a more multifaceted account” for suppliers and has enabled Salesforce to negotiate better corporate rates.

“[The program] has been very well received, especially among our younger employees,” he said. “And when it comes to travel policy, we allow personal extensions or bleisure so long as it does not add any additional cost to the trip, and if it does, the expectation is the employee will then break out any of those additional expenses.”

Salesforce currently has more than 20,000 travelers in its ‘Road Warriors’ community, which has “one of the most interactive Slack channels in the company,” where conversations traverse both business and leisure travel, he said.

The added personal benefits for travelers also have driven greater policy compliance and has proven to be an important factor in both attracting and retaining employees.

Post-pandemic, Stonie said the company’s business travel patterns are “evolving.” Business travel volume is down compared with 2019, unsurprisingly, but the average length of stay has increased, due to a combination of “purposeful travel”—folding multiple trips into one—and personal extensions, according to Stonie.

Even travel managers with smaller-scale programs are finding value in harnessing leisure and blended travel.

Tracie Saunders, director of business operations at HR consulting firm Segal, manages a travel program with some 300 travelers, 75 of whom are frequent travelers. She said incentivizing her employees to access corporate discounts for their personal travel, and extending supplier benefits via loyalty program memberships helps to drive compliance and discourage leakage.

As a smaller program, she said, “we are not in a position where we have a lot of upfront discounts, so for me it’s more about capturing spill and making sure that all of our spend is visible.”

An inherent part of this process includes employees linking Segal’s corporate ID to their personal loyalty membership when booking leisure travel. Benefits from airlines include promotional discounts and additional status points, while brand-wide hotel discounts provide opportunities for savings, especially, according to Saunders, for smaller programs that might not have enough volume in a particular city to establish a meaningful relationship with an individual property.

While providing suppliers direct access to individual travelers has been a sore point among some travel managers, Saunders said she “likes the idea of being able to work in tandem” with airline and hotel loyalty programs.

“For me, the traveler experience is improved when someone can become a loyalist of a brand that we already partner with and where we’re offering them [personal] savings opportunities and their status is increasing... and even though I’m not going pay for them to be in a suite because that’s not our policy, if travelers can be in a suite [thanks to status upgrades] while they’re on the road for us, then that improves their traveler experience and makes them that much more excited [to travel],” she said.

Salesforce has also been successful in building direct supplier connections with its Road Warrior community through dedicated Slack channels.

“We do have guidelines with the suppliers that access the channels,” he said. “They can’t be selling or promoting non-preferred suppliers or promoting something that would be deemed outside of policy.”

Stonie added that facilitating the business-to-business-to-consumer connection and allowing suppliers to communicate directly with travelers in real time has improved the traveler experience and helped to improve efficiencies around addressing traveler inquiries.

“It’s a win-win-win situation, and we’re always looking for ways to be able to enhance it,” he said. “We’re looking to extend access to an increasing number of preferred suppliers within our global program. This not just limited to the U.S. but helps support our traveler base in more than 34 countries.”

COURTING LEAKAGE?

While a combination of cost savings, productivity gains and happy travelers seems like a match made in heaven, Gold-Spring Consulting partner Will Tate said the deployment of New Distribution Capability air content and the onset of technology like ChatGPT could lure travelers further astray with personalized sales and marketing messages based on personal traveler preferences rather than corporate policy. And the risk of this happening increases, according to Tate, when leisure or blended travel are added to the mix because “travelers get accustomed” to particular hotel chains or airlines.

“If the program of record is not providing the best fare, the best experience, this will very likely stress the system and that tension is likely to drive [travelers] outside [the program],” Tate explained. “And if they go outside the program we lose duty of care, we lose negotiation leverage and we also lose the ability to create a nice, harmonious experience for the traveler.”

Major U.S. carriers like Delta, Southwest and United now are incentivizing corporate accounts to encourage loyalty sign-ups, with the latter recently introducing United for Business Blueprint.

According to United vice president of sales strategy and effectiveness Glenn Hollister, the Blueprint program moves beyond traditional contractual relationships based on discounts for share to focus on “the value we are creating for each other.” For corporates, this value can translate to discounts or added benefits through its Jetstream portal that can be used to purchase club passes, status, SAF or a Wi-Fi subscription. The airline, meanwhile, sees more travelers enrolled in its MileagePlus loyalty program and corporate partners encouraging application downloads among employees.

Hollister said that, thanks to NDC, the new program provides greater flexibility and personalization as all the carrier’s ancillaries now can be included in a deal.

“Now anything United sells or has can be put into deal. That’s something we couldn’t do with the old system,” he said.

The carrier’s dedicated bleisure offering, Break for Business, which extends discounts on leisure fares to corporate

travelers and their partners and family, now will be rolled into the Blueprint program as a “value element.” Hollister said travel managers also can gear Jetstream benefits towards bleisure.

“Ultimately, what we’re trying to do is to enable the travel manager to design a travel experience that matches what [they] want to deliver to employees while staying within the company’s culture and financial objectives,” he added.

Consulting giant EY last year launched a pilot project with open-source travel distribution platform Winding Tree to provide a block-chain-based portal for U.S. employees to book leisure trips.

In a previous interview with BTN, EY global innovation and technology lead Ian Spearing at the time told BTN the company wanted to test NDC capabilities to personalize content and fare bundles in the leisure space to “bring something different to employees”.

“We wanted to really test how someone can build a combination of discounts and benefits that can be packaged together, depending on the types of routes they would select, that is not fully constructed in the current GDS,” Spearing said in December.

At the time, Spearing said feedback from employees had been “great” and the company was looking to expand the offer globally as well as integrate a hotel component.

“We’ve definitely identified and proved that there is supply chain efficiency and visibility improvements by connecting directly in the leisure space,” Spearing added.

SUPPLY AND DEMAND INCONSISTENCIES

When it comes to reworking travel policy to incorporate blended and bleisure trips, Tate said only about 25 percent of his clients are “putting effort into it” and currently assessing how to improve management processes. That’s not to say bleisure travel isn’t happening. “It’s happening



“It’s a win-win situation, and we’re always looking for ways to be able to enhance it.”

— SALESFORCE’S
DORIAN STONIE

TREND

99 percent of time,” Tate said. But challenges around traveler safety and insurance, as well as shortfalls in traditional booking infrastructure, are limiting widescale program change.

The post-pandemic rise of the ‘workation,’ in which an employee works remotely for an extended period time, usually in leisure destination, also raises questions about duty of care and the longer-term impacts on managed travel.

The new ISO 31030 standard for managing business travel risk, released in 2021, doesn’t stipulate whether support for blended trips should be provided, but indicates it should be clarified in a company’s travel policy and communicated to employees.

While the bleisure trend has been leveraged by some companies to attract and retain talent, sometimes with a remuneration package that includes a personal workation travel budget, this is largely considered the purview of the HR department, rather than travel.

CWT Solutions Group senior director Rich Johnson said remote work models are “definitely” influencing an increase in bleisure travel and workations, but that the TMC has not witnessed any clients leverage the additional leisure volume in contract negotiations.

“The reason we aren’t seeing a material change in negotiation leverage is because the destinations could be more commonly leisure traveler locations and as such, volumes wouldn’t warrant discounts, demand from holidaymakers would be high anyway, and the competition on certain routes may not be on a large enough scale,” he said.

Similarly, Laura Kusto, vice president and global hotel practice lead at BCD’s Advito consultancy told BTN that bleisure hasn’t affected their corporate clients’ hotel sourcing strategies. Instead, she said chief concerns are around mitigating rate increases and assessing sustainability metrics.

At least one technology partner for BCD, however, has a different view.

“Blended travel requires access to different content and different experiences and travel managers are keen to facilitate this for their employees,” said Adam Kerr, founder and CEO of Tripism, a business travel planning platform, that is part of BCD’s SolutionSource marketplace. But current travel booking technology, he said, doesn’t facilitate blended travel.

Tripism already enables the presentation of supplier benefits and promotions to travelers. Kerr said “significant volumes of users” are accessing the platform to take advantage of suppliers’ leisure promotions and benefits.

Norway-based tech start-up Travelin.AI is taking things a step further with its online booking tool, which allows travelers to combine business and leisure trips while automatically separating the expenses.

“We looked at how people live, work and travel and built the technology backwards,” said Travelin.AI CEO Roy Golden. He added that travelers want a better booking and expense management experience, and that current tech is “stuck in the 80s.”

“In the new [post-Covid] world it doesn’t make sense [for

an OBT] to just deliver a business trip, we’re too far gone,” he said.

The cloud-based platform can be customized according to corporate needs, with capabilities to book air and hotel for business and/or leisure travel, blended travel and workations.

The platform also includes individual profiles for guest travelers (family and friends) to be added to blended trips, while the workation feature allows travelers to tap into a travel budget attached to their compensation package.

“We built our own payment technology so the system can identify what is a business expense and what is leisure expense and separates them automatically with no financial burden to the business and zero intervention by the traveler,” Golden explained.

Since its soft launch last July, Travelin.AI has been working with 13 corporate clients, largely from the management consulting and tech industries, to build the tool’s AI capability. Of these, two clients use the tool solely to manage workation packages, while the remainder are booking business and bleisure trips.

The ultimate goal, however, is to offer the tool to TMCs as an end-to-end platform or to integrate with existing workflows.

But even without the productivity gains of automation, both Stonie and Saunders believe bleisure travel adds a meaningful component to their managed programs.

“[Bleisure] is a huge added value for employees, and it’s something that is meaningful to them and that an organization should be mindful of,” Saunders said. And while gray areas, such as additional TMC transaction fees or insurance coverage for blended trips, can “create issues,” she said the benefits of supporting employee well-being through bleisure travel “are valuable enough that [travel managers] should be willing to evaluate every kind of pain point, and to address them, as opposed to turning off the opportunity.” ■



“Bleisure is a huge added value for employees, and it’s something that is meaningful to them and that an organization should be mindful of.”

— SEGAL'S TRACIE SAUNDERS

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