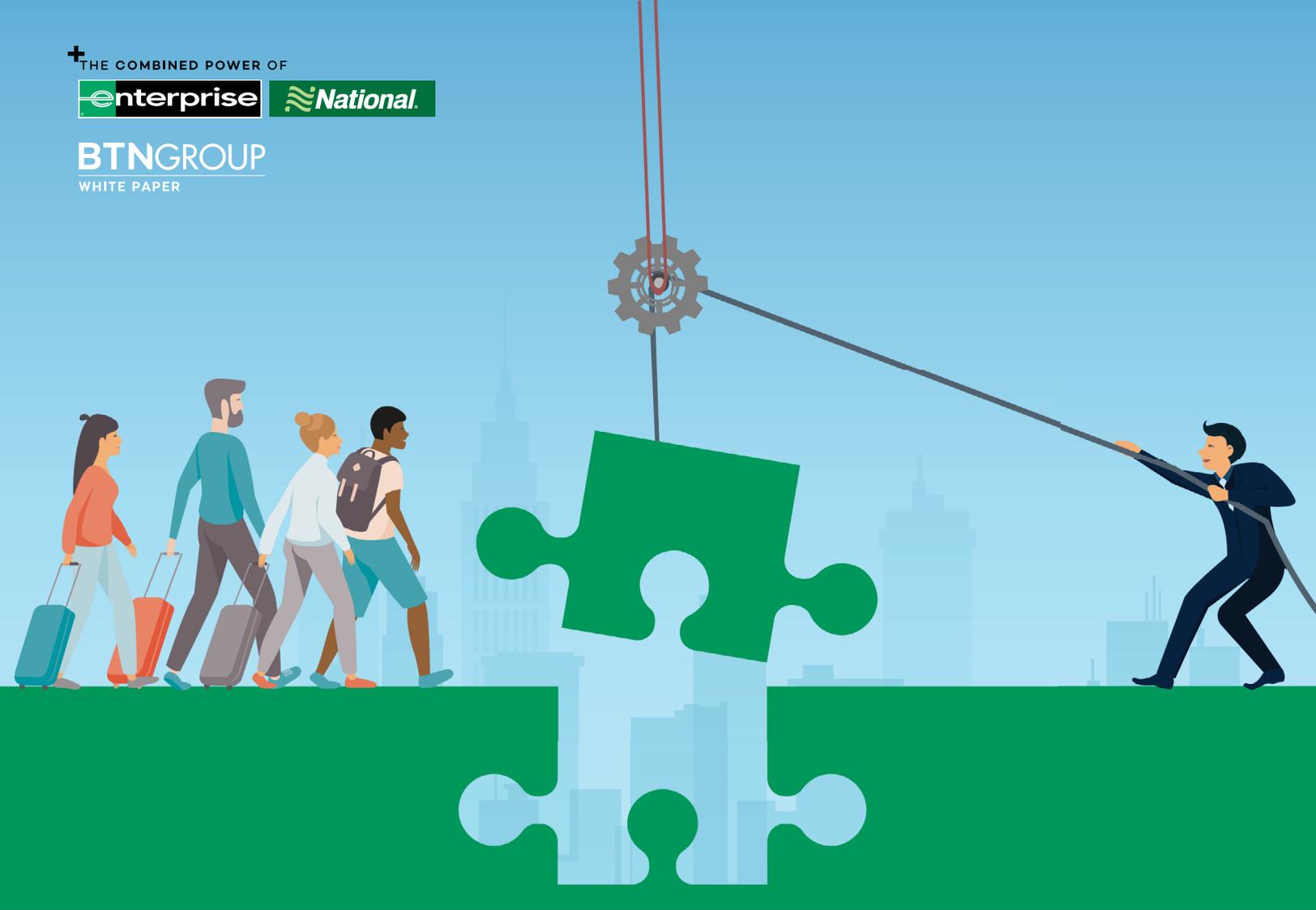


THE COMBINED POWER OF



BTNGROUP

WHITE PAPER



Meeting Business Traveler Expectations **IN NEW ERA OF MANAGED TRAVEL**

OVERVIEW

With the latest labor market reports pointing to a sharp rebound in employment, including a healthy rise within the leisure and hospitality sector, [[“The Employment Situation,” Bureau of Labor Statistics](#)], the much-anticipated rush of pent-up demand for business travel may finally be upon us. Could the top concern among travel managers now shift from how to protect employees to how to keep up with rising traveler expectations?

The pandemic forced travel programs to shift priorities to keep their employees safe. The resulting sudden suspension of travel also provided companies an opportunity to experience significant savings by substituting face-to-face meetings with virtual ones. As business travel continues to recover, how will travelers’ expectations change, and will corporate travel policies migrate more toward cost savings or traveler satisfaction? What changes from the pandemic might become permanent?

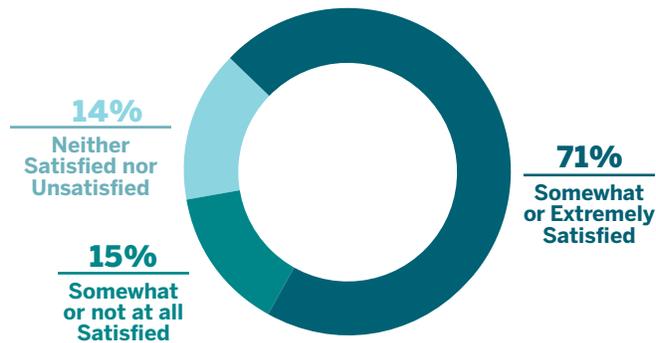
To better understand the mindset of travelers and travel managers alike, The BTN Group, in partnership with sponsor Enterprise Holdings Inc., conducted separate surveys of each group, obtaining a snapshot of the current state of global business travel affairs and exploring expectations as more companies return to business travel. The results reveal where travelers and their companies agree and disagree on a range of travel policies—and what travel managers might do to address any lingering reluctance of employees to travel.

Key Findings



1 / MEETING TRAVELER EXPECTATIONS

How does your company's travel and duty of care program meet your expectations when you must travel for business?



SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs, conducted in October 2021



2 / DOES THE TRAVEL PROGRAM HELP YOU ACHIEVE BUSINESS OBJECTIVES?

How does your company's travel policy and duty of care program help you achieve business objectives when you must travel for business?



SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs, conducted in October 2021



Nearly three-quarters of travelers are currently satisfied with their companies' travel policies and feel the policies help them achieve their business goals. For business travelers, 45% feel safety and security is more of a priority than company savings and 43% said they plan to travel less compared to 2019 because of safety concerns.



Choices on mode and class of travel and types of lodging are most-requested by business travelers, but most travel managers said their programs already offer such options.



Nearly two-thirds of travel managers said their top priority in 2022 will be finding a balance between cost saving and employee demands. Six in 10 travel managers say that keeping their business travelers happy will be a challenge as travel increases. One commented: "Travelers expect things to be the same as they were prior to COVID ... it will be difficult to meet expectations." Only six in 100 think that doing so will be easy. Data suggests that those concerns are not unfounded. The challenge of meeting traveler expectations may fall heavily upon supplier partners, some of whom are facing labor shortages and supply chain problems. But it also may be about giving travelers more choices and information—both before and during travel.

Read on for a deeper dive.



Business Traveler



Travel Manager



3 / BALANCING TRAVELER SATISFACTION WITH OTHER DEMANDS

As of 2022, which of the following will be your top priorities in your travel and duty of care program?

Balancing cost savings / budgets with employee demands to travel



Meeting traveler expectations for higher levels of service than suppliers can provide right now



Providing suppliers with accurate forecasts on travel volume and traveler expectations



Managing a surge of travel due to pent-up demand from existing travelers



Managing a surge of travel from new types of travelers, e.g., new employees, Work-from home employees who must travel to meet colleagues



Meeting more demanding traveler expectations for more choices



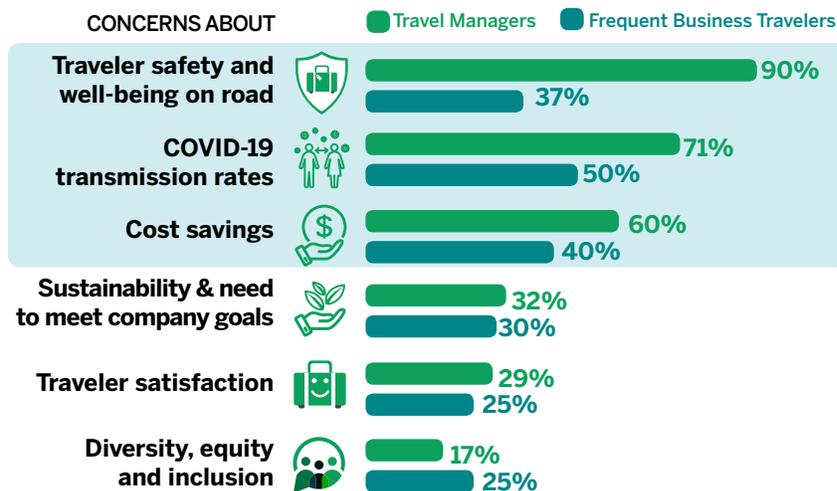
SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 106 travel, expense, finance, procurement or other executives responsible for managed travel, conducted in October 2021

MANAGED TRAVEL IS CHANGING

Frequent business travelers and travel managers agree that company travel and duty of care programs are changing for a myriad of issues. Travel managers overwhelmingly cited traveler safety and well-being on the road as the key driver of changes. In contrast, just 37% of business travelers surveyed cited that; rather, about half of them identified COVID-19 transmissions as prompting most changes to their travel programs. Regarding cost savings, three of five travel managers cited this as a top driver of program changes. Business travelers on the other hand, feel it is a slightly bigger driver for their companies than traveler safety and well-being on the road.

4 / WHAT'S DRIVING CHANGES IN MANAGED TRAVEL PROGRAMS?

Company travel and duty of care programs are changing for a variety of reasons. Ranked by travel manager responses



TOP 3 DRIVERS
prompting most of the changes in company programs



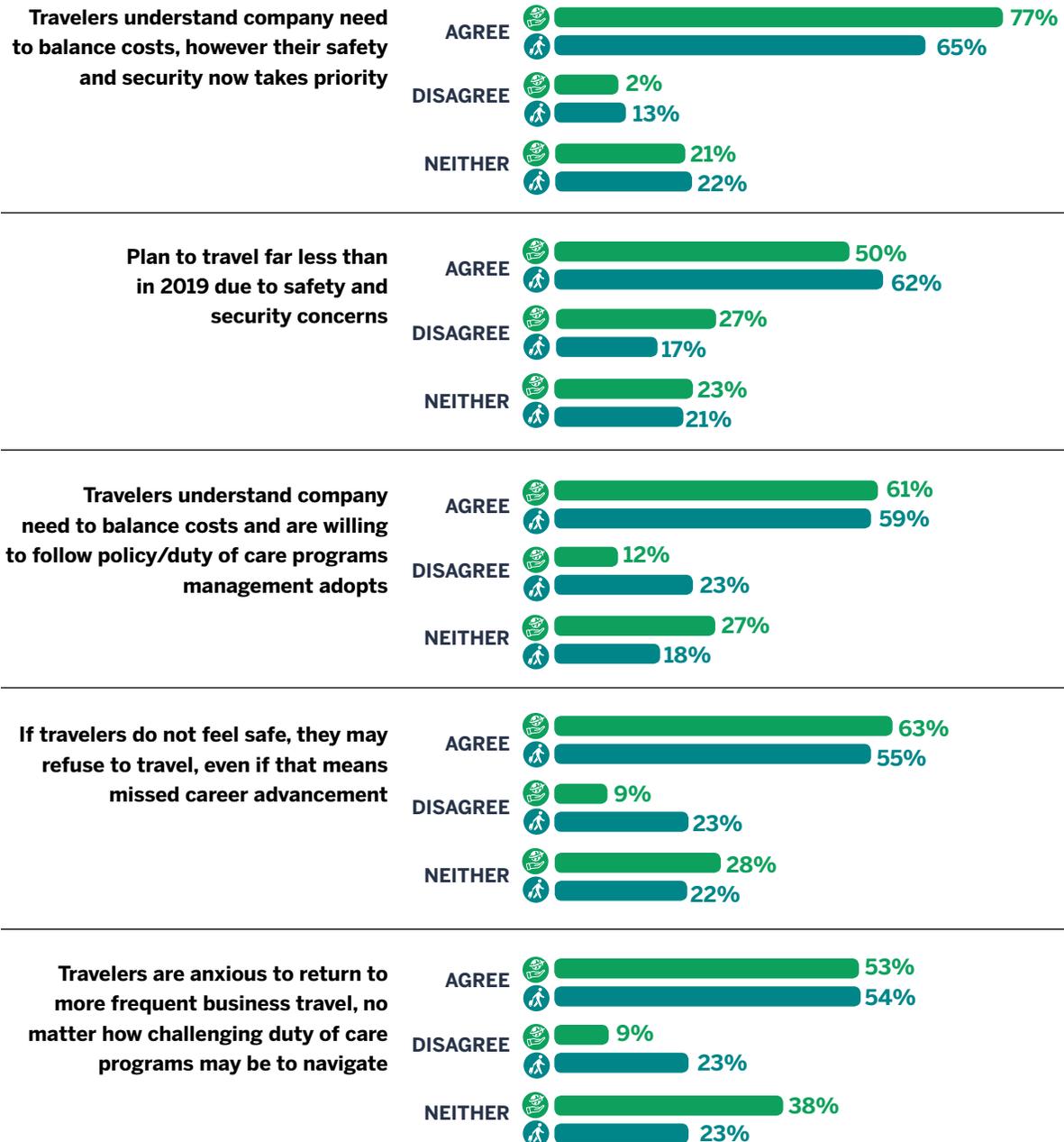
SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 106 travel, expense, finance, procurement or other executives responsible for managed travel, and 323 frequent business travelers in managed programs, both conducted in October 2021

A DESIRE TO TRAVEL FOR BUSINESS

Over the last two years, the inability to conduct business face-to-face has undoubtedly led to some pent-up demand. Over half (**54%**) of respondents in our business traveler survey said they were ready to begin traveling more frequently, no matter how challenging it might be for duty of care. One in four travelers thought their company's priority around traveler safety and well-being was too high. Nearly **six in 10 travelers** indicated they were prepared to accept whatever travel policies management adopted.

5 / BALANCING COMPANY AND TRAVELER CONCERNS

How much do you agree or disagree with the following concerning company travel programs?



SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs and 106 travel managers, conducted in October 2021

HOW TRAVEL PROGRAMS INFLUENCE THE TRAVELER EXPERIENCE?



6 / COMPANY DUTY OF CARE, TRAVEL PROGRAMS POSITIVELY INFLUENCE TRAVELER EXPERIENCE

How do your company's travel and duty of care programs influence your travel experiences?



SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs conducted in October 2021

The BTN-Enterprise research found that business travelers are now largely satisfied with current travel policies—if still a bit leery about traveling while new cases of COVID-19 are still being reported. Nearly three-fourths of travelers expressed satisfaction with their companies' travel policies and duty of care programs. A similar percentage said they were somewhat or extremely satisfied with the success in travel policies to help them achieve their business goals. Two in five said they would follow whatever policy and duty of care programs management adopts.

Our research identified some lingering unease among travelers about taking business trips during the pandemic. More than six in 10 said they planned on traveling less moving forward than they did prior to the pandemic. (Chart 5) While more than half said they would refuse to travel when they felt unsafe even if that led to missed career opportunities. That finding comes after earlier research from SAP Concur over the summer showed 20 percent of employees would seek other employment if travel and expense policies failed to meet expectations to protect their health and safety [["Concur Survey: Travelers Want Post-Pandemic Policy Changes," Business Travel News, June 21, 2021](#)].

What are travel policies like in the current climate? Our research provides a snapshot of what they may look like—and how travelers feel about them.

No Changes in Travel Policies: Three of five travel managers said their travel policies were about the same as at the start of 2020. One-quarter of business travelers agreed. Anecdotally, several travel managers have noted that while policies haven't changed, processes or addendums detail necessary changes due to the pandemic.

More Restrictive Travel Policies: One-third of travel managers and 35% of business travelers said policies at their companies are more restrictive today than at the start of 2020. Fewer employees are allowed to travel (77%), travel requests must be approved by more managers (71%), and travelers are required to book in preferred channels (43%), said travel managers.

More Lenient Travel Policies: While just 9% of travel managers described policies as more lenient than in 2020, about 40% of business travelers said that was so. Two of five business travelers cited more choices on ground transportation options, ability to add leisure days to business trips and trip durations.

Explaining how travelers have more choices in their programs, travel managers said that their "policy is generally softer than in the past," or more relaxed on use of personal or rental cars in lieu of flying. Anecdotally, travel managers have allowed policy exceptions to help make employees comfortable with travel.

As volumes rise, travel managers worry that they won't have the time or resources to provide personalized service to increasing numbers of employees, perhaps a concern that drove one of the key findings of this study.

Seven of 10 travel managers said their programs already allow travelers to choose whether to drive a personal or rental car or fly to a destination; stay at a chain hotel, boutique or independent property; or add personal days to business travel. Six of 10 travel managers said their policies allow premium economy and three of 10 allow use of short-term rental properties, two often-cited requests of business travelers.

What choices do business travelers want? While many surveyed said their programs already allow choices listed, others identified additional options in Chart 7.



7 / TOP FIVE TRAVELER WANTS

What is not included now in your company's program that you would like to have?

Boutique or independent hotels	14%
Short term rentals (Vrbo, Airbnb)	12%
Premium economy	12%
Renting a car to drive to destination	11%
Options to add personal days to business travel	14%

SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs conducted in October 2021.

While a large majority of travelers expressed overall satisfaction with travel policies, some of those policies were met with less enthusiasm than others. Moreover,

travelers sometimes disagreed with their companies over the benefits of specific rules. We examined three policies related to accommodations: requiring the use of a specific hotel brand, requiring a stay at a national chain and allowing use of an Airbnb-type rental. More than half of travel managers said their travelers typically have normal expectations of such policies, but just one-quarter said travelers expect that companies validate the safety/security of travelers' short-term rental bookings.

More than half of business travelers with normal expectations of lodging providers said providers met or exceeded their expectations. Of those with lower expectations, 29% said brands selected by their companies don't meet their expectations. Business travelers voiced plenty of requests for more choices in lodging, including more budget options.

8 / HOW POLICY MANDATES INFLUENCE TRAVELER EXPECTATIONS

Do Policy Mandates on Lodging Lower or Raise Traveler Expectations?

If your company policy requires use of certain brands or types of accommodation, are traveler expectations lower or higher?

■ LOWER EXPECTATIONS ■ NORMAL EXPECTATIONS ■ HIGHER EXPECTATIONS ■ NA

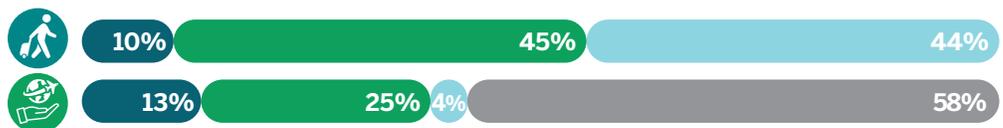
When my company's lodging policy requires me to use a specific brand, my expectations are:



When my company requires me to stay at a national chain instead of a boutique hotel or short-term rental, my expectations of the chain are:



When my company allows me to stay at a lodging rental property of my choosing, expectations that the company will validate booking choices for safety are:

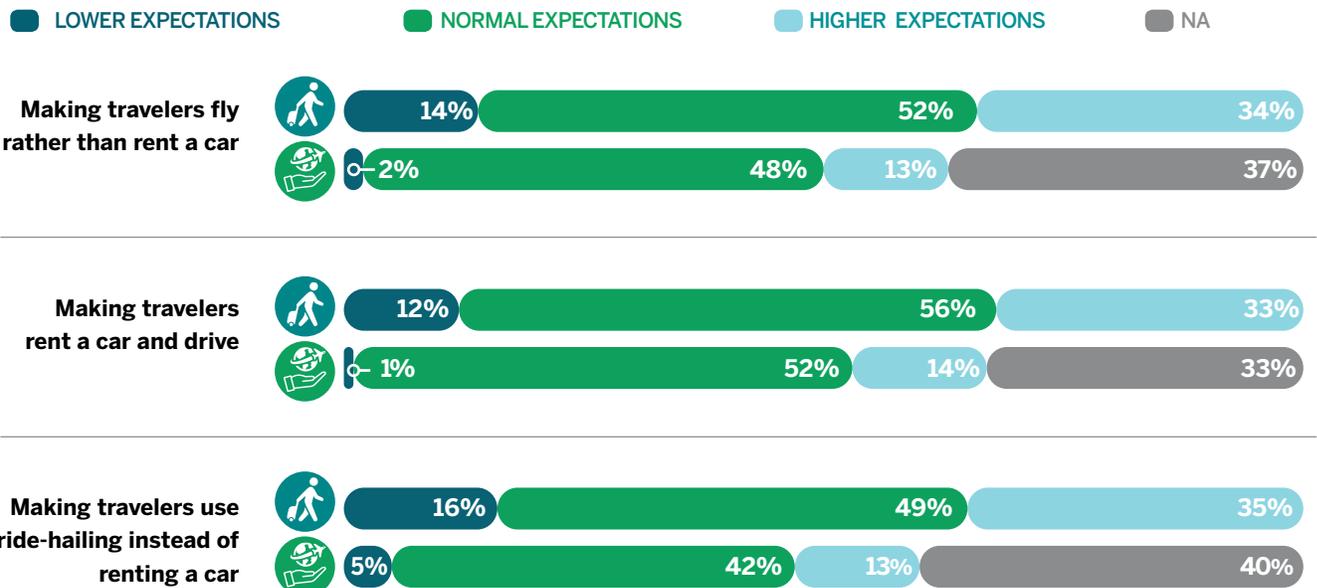


The BTN-Enterprise research also examined three company policies governing modes of travel: requiring travelers to fly rather than drive, requiring them to drive and requiring them to use a ride-share instead of a rental car. Of business travelers who said they have normal expectations of policies that require them to rent a car, 90% said rental car providers either meet or exceed their expectations. Less than 10% said rental car providers typically don't meet their expectations.

How can companies better meet traveler transportation needs? "Let me have more freedom in deciding how I would like to travel," said one business traveler. Others asked for more choices on vendors, car types and booking options, as well as better vehicles.

9 / DO POLICY MANDATES ON MODE OF TRAVEL LOWER OR RAISE TRAVELER EXPECTATIONS?

If your company policy dictates the mode of travel you must use, do you, or your travelers, have higher or lower expectations of the travel provider?



The gap in attitudes between travelers and travel managers also comes through when exploring individual priorities towards four key concerns for travel programs: safety and well-being, cost savings, traveler convenience and traveler comfort. One out of five travelers said their company travel policies and programs do not prioritize traveler convenience enough. That compared with 16% of travel managers thinking traveler convenience was not prioritized enough. On the flip side, more than one in four travelers (27%) thought cost savings was prioritized too much. More than eight in 10 travel managers (81%) thought the priority on cost savings was just right.

The largest gap in where travelers and travel managers think priorities should lie is in attitudes about traveler safety and well-being. While more than one in four travelers (27%) said traveler safety and well-being received too high a priority in their travel programs, just 4% of travel managers agreed. Nearly 80% of travel managers and 60% of travelers thought the priority on traveler safety and well-being was just right. The fact that a significant portion of travelers thought safety was given too high a priority could indicate pent up-demand to resume business travel. Meanwhile, travelers and travel managers were aligned on the priority given traveler comfort with 21% of travelers and 23% of travel managers saying it received too low a priority.



10 / PROGRAM AND POLICY PRIORITIES

COMPANY PRIORITIES TOO LOW



COMPANY PRIORITIES JUST RIGHT



COMPANY PRIORITIES TOO HIGH



A FOCUS ON DUTY OF CARE

While duty of care is often cited as cause for some travel restrictions, a key takeaway from the BTN-Enterprise study is that travelers are largely satisfied with their companies' travel policies. That's certainly the case with duty of care. Nearly six in 10 travelers (58%) indicated that duty of care programs had a positive influence on their travel experience. Nearly one in five (19%) even went so far as to say it has a significantly positive effect.

Communicating with travelers as part of the duty of care program arose in the BTN-Enterprise research as a potential area for travel managers to improve. **Study findings reveal a disconnect in perceived effectiveness of traveler communications between travel managers and business travelers.** With nearly six of 10 business travelers indicating that the duty of care program left a positive impression on them, just over half (54%) said their company was effective in informing travelers before trips. Another 20% rated communications prior to a trip as ineffective or very ineffective while the remaining quarter said their company was neither effective nor ineffective.

When disruptions occur, one in four travelers said their companies were ineffective in making them feel informed about the changes. In contrast, only one in 10 travel managers rated their programs as ineffective. Nearly eight in 10 travel managers thought their

company was effective with informing travelers prior to trips and more than two-thirds rated their programs as effective or very effective in informing travelers during a trip when things change, making travelers feel protected during domestic and international travel, and making travelers feel that help is just a text, call or button-push away should they need it.



11 / HOW TRAVEL POLICIES IMPACT TRAVELERS' ABILITY TO DO JOB?

What impact are your company's travel policy and changes in the past year having on your ability to do your job and interact with colleagues, customers and prospects?



SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs conducted in October 2021

12 / TRAVELER VIEWS OF DUTY OF CARE PROGRAMS

MY COMPANY'S TRAVEL PROGRAM MAKES ME FEEL:	INEFFECTIVE OR VERY INEFFECTIVE	NEITHER	EFFECTIVE OR VERY EFFECTIVE
Informed prior to travel	21%	25%	54%
Informed during travel when things change	25%	21%	54%
Protected during a domestic trip	19%	28%	53%
Protected when traveling internationally	19%	24%	57%
That help is just a text, call or button-push away should I need it	17%	24%	59%

SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 323 frequent business travelers in managed programs conducted in October 2021

CONCLUSION

Transitioning out of the pandemic and creating a roadmap to ramp up global travel may well prove one of the most difficult—and important—challenges today's corporate travel managers have to face. To succeed, those in charge of implementing travel policies must align company goals with program deliverables that traveling employees depend on to effectively do their jobs on the road. Our research provides important data for accomplishing that balancing act.

Business travelers are eager to resume their pre-pandemic business activities, and they're open to embracing—or at least tolerating—their companies' travel policies in exchange for conducting business on the road again. Traveling employees want more frequent trips, even at the cost of challenging duty of care protocols, and they are prepared to accept whatever travel policies management adopts.

At the same time, many travelers feel ambivalent about traveling during a period of unknown risk and expect their companies to prioritize their safety and well-being as much as they do. As they begin taking business trips once again, travelers will likely experience greater levels of traveler friction than they're accustomed to. To help mitigate this, travel managers must remain carefully attuned to their travelers' concerns and preferences.

While budgetary restraints and safety concerns prevent companies from fulfilling every traveler wish, some provisions could achieve traveler buy-in at little cost to the company (adding leisure days to a business trip or enhanced communications).

Traveler training or retraining through virtual meetings or even virtual travel fairs with key suppliers could help build

traveler confidence with the new realities of business travel. From airport security and boarding protocols to COVID-testing and mask-wearing, hotel checkin to housekeeping, travelers need to know the new rules of travel. Travelers may also need a refresher on travel and expense policies, or on new key suppliers. Company executives or the travel team could explain the rationale for travel program changes or duty of care provisions to ensure travelers understand the drivers of their programs.

There are clear gaps between traveler and travel manager priorities, but not always over issues one might expect. Convenience and comfort are important to travelers, but so is cost savings. **And, perhaps surprisingly, more travelers than travel managers may be ready to assume calculated risks to travel—with many travelers saying safety and security are prioritized too much in company travel policies.**

To some extent, winning over travelers may be less about increasing travel budgets than about letting travelers weigh in on their needs. Indeed, several traveler managers noted that they haven't yet asked travelers what they want and expect in 2022. Travelers may be less certain about specific policies but they object to having no voice or choice.

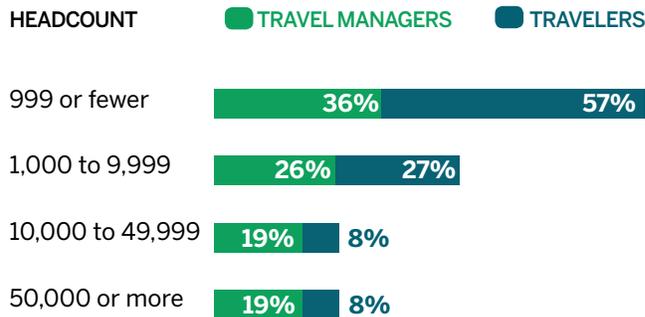
Perhaps the most important lesson coming out of our research is that travelers appreciate timely communication before and during trips—and their perception that companies fail to inform them is causing dissatisfaction. The good news is that of all the challenges facing travel managers today, better communication may be one of the easiest to solve. Opening clear and timely communication channels can go a long way toward keeping travelers satisfied.

SURVEY METHODOLOGY AND DEMOGRAPHICS

The BTN Group Content Solutions fielded an online survey about managed corporate travel programs and travelers in October 2021 to corporate travel and expense decision-makers responsible for managed travel within their organizations. Of the 106 respondents, 82% identified themselves as travel managers, directors, vice presidents or other stakeholders; 18% identified themselves as expense, finance, human resources, procurement or other corporate

stakeholders. Simultaneously, Enterprise Holdings fielded a related survey with many similar questions, as well as some unique to frequent business travelers who must follow travel policy or guidelines with 323 qualified respondents. To qualify, business travelers had to travel at least 50 miles from home in 2019 with at least one overnight stay domestically or internationally.

COMPANY SIZE



SOURCE: The BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 106 travel, expense, finance, procurement or other executives responsible for managed travel, and online survey of 323 frequent business travelers, both conducted in October 2021.

GEOGRAPHIC REACH OF PROGRAMS AND BUSINESS TRAVEL

Where managed travel programs operate for respondent travel managers and travel destinations of frequent business travelers in 2019.

	Where managed travel programs operate for respondent travel managers	Travel destinations of frequent business travelers in 2019
Globally	48%	2%
United States	63%	85%
Europe	25%	27%
Asia / Australia	25%	19%
Canada / Mexico	23%	30%
Central / South America	20%	16%
Middle East / Africa	13%	5%

SOURCE: The BTN Group / Enterprise Holdings Inc. "Meeting Business Traveler Expectations In New Era of Managed Travel" online survey of 106 travel, expense, finance, procurement or other executives responsible for managed travel, and online survey of 323 frequent business travelers, both conducted in October 2021

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