



# REINVENTING YOUR MANAGED TRAVEL PROGRAMS

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When the pandemic put the brakes on business travel, it did more than unravel the trip plans for millions of corporate travelers. The hiatus triggered a reassessment of the entire travel program as corporations focus on critical needs. Travel managers and other stakeholders have had to reprioritize key areas such as savings, duty of care, technology, reporting and vendor relationships. To do so during a pandemic has meant tighter programs and increased scrutiny of trips, while simultaneously managing partnerships with more selected travel management companies (TMCs) and suppliers. As corporations put more protocols in place, travelers will need retraining. With a greater emphasis on

management and pretrip approvals, travelers now need to think differently about how, where and when to book.

To better understand how companies are thinking about managed travel programs, The BTN Group, in partnership with sponsor Egencia, in early 2021 fielded a broad-ranging online survey to corporate executives responsible for such programs: travel and finance managers, human resource professionals, procurement, risk management and other stakeholders. Responses shed light on how corporations are rethinking their program strategies and reprioritizing goals with urgency, while also preparing for a post-pandemic future.

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# EXECUTIVE SUMMARY

Here are the top trends in reinventing the travel program for travel managers and other stakeholders in the Americas and EMEA regions

### MANAGED RULES:

Chances are, if your program wasn't managed, it will be. Respondents in a managed program rose by 13 percentage points from 2019-2021 as fewer companies believe it is enough to just "strongly encourage" use of a program. **Chart 1**

### MORE OVERSIGHT:

There is little doubt that programs are getting tighter, not looser, even if travelers prefer more independent options. Roughly half of respondents reported more senior level involvement of travel program and policies in the past year. **Chart 3**

### PERMANENT CHANGE:

Most respondents noted that COVID caused them to reset priorities in their travel program. And these aren't just temporary moves – 63% said their travel program is forever changed as a result of the pandemic. **Chart 4**

### NEED TO RETRAIN:

Nearly three quarters of respondents said their travelers will need to be retrained on policy, practices and safety once travel resumes as travel programs become more complex. **Chart 4**

### SAFETY FIRST:

With the pandemic still spreading globally, it's no surprise that eight in 10 respondents (and nine in 10 with a global program) cited increased concerns about traveler safety and well-being as the biggest change in the past year. **Chart 3**

### SAVINGS SCRUTINY:

Even though companies have tightened travel budgets in anticipation of economic fallout from the pandemic, increased scrutiny of spend was not a top trend, ranking eighth. This does not mean savings is less important – 71% of respondents said it's a key performance indicator for their travel management program in 2021. **Chart 3**

### CUTTING BACK:

With less travel to manage and greater demand for consistency, companies are also cutting back on the use of multiple TMCs for their global program. As of 2021, 68% of respondents used one TMC globally compared to 63% in 2019. **Chart 9**

### FEWER, STRONGER RELATIONSHIPS:

In terms of sourcing supply, more than half of respondents said it's important to deepen relationships with preferred suppliers to drive specific initiatives or enhanced service. And most respondents plan to reduce or maintain the number of suppliers to better leverage spend and save money. **Chart 14**

### WHAT'S ESSENTIAL:

Scutinizing trips, limiting travel and ensuring traveler safety are now front and center in the travel program. For three quarters of respondents, defining essential travel is the biggest change to their program, followed by enhancing duty of care programs. **Chart 5**

### SUSTAINABLE FUTURE:

More than half of respondents said sustainability is a company priority, and they plan to reduce/offset emissions with travelers and suppliers. These organizations are the most passionate about building sustainable options into the booking flow and are seeking help from their TMC. **Chart 10, Chart 11**

### THE BACK BURNER:

Most respondents are not yet requesting tools for predictive analytics or data-driven business intelligence. And while 25% of respondents have implemented artificial intelligence/machine learning solutions to assist with data driven decisions, 62% have no plans to do so. **Chart 12, Chart 13**

### PRACTICAL TECH:

Important technology initiatives include automating the most necessary processes, including unused ticket tracking and reuse technology. More than seven in 10 also cited traveler tracking technology and savings optimization. **Chart 12**

### GOING VIRTUAL:

Roughly six in 10 respondents are providing guidance in online booking tools with links to virtual options (to replace travel), and are also adding language in their policies. **Chart 18**

### TIMES CHANGE:

With tighter programs and shifting priorities, companies have set new expectations for services provided by their travel management company. The biggest service priorities for 2021-22 – duty of care, customer service, savings, technology and on demand reporting – have all grown significantly since one year ago. **Chart 11**

### CULTURE SHOCK:

All the stress around travel has certainly affected company morale. The largest percentage of travelers in all regions said the decrease in travel in 2020 had impacted company culture. The biggest reason: Employees miss the comradery of meeting with colleagues at industry and internal meetings. **Chart 15**

### THE SKEPTICS:

There is still a lot of skepticism around the return of business travel to 2019 levels – if at all – as companies rely more on virtual meetings technology. Only 17% of respondents expect 2022 travel spending to increase over 2019 levels. **Chart 17**

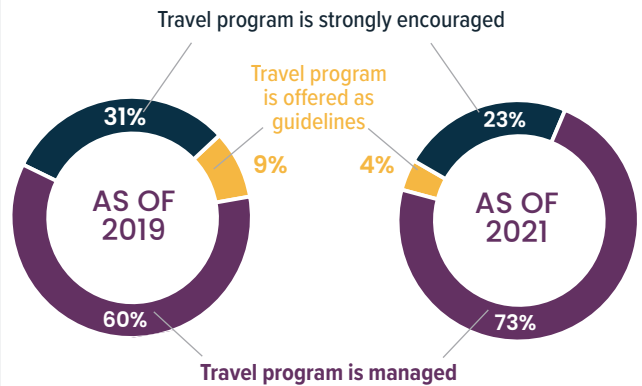
### A TIGHTER REIGN ON PROGRAMS

Chances are, if your program wasn't managed, it will be. The need to limit travel, evaluate trip necessity and ensure traveler safety has led to reimagined programs and strategies for a large number of corporations. It's been over one year since COVID grounded leisure and business travelers, giving travel managers and other stakeholders plenty of time to think through what works/what doesn't and what's next for travel management.

Fewer companies believe it is enough to "strongly encourage" use of the program. For reasons of duty of care and supplier negotiations, management has become more prevalent and necessary. Our survey found that while six in 10 respondents were in a managed program in 2019, that figure rose to more than seven in 10 in 2021. **Chart 1.** And these programs are upping enforcement: More than half of respondents have tightened or mandated traveler tracking technology, and 45% have tightened/mandated booking choices. **Chart 2**

#### Chart 1

Which option best reflects your travel program for each of the following timeframes:



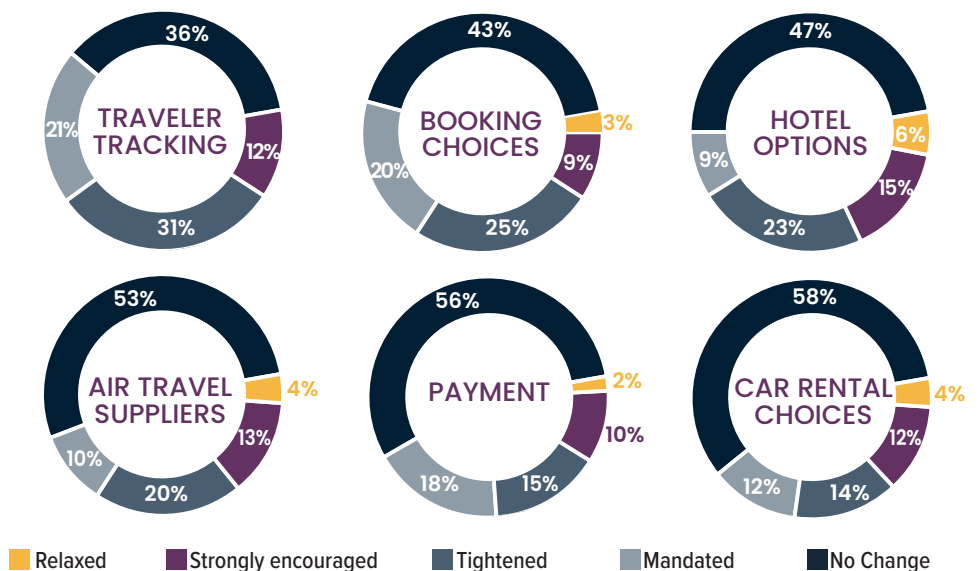
Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

**Our newly mandated program will allow enhanced air and hotel agreement cost savings to be more fully realized, and automatically give us better traveler tracking and booking data as well as sustainability data"**

– Travel Manager

#### Chart 2

Has your organization increased or relaxed guidance or mandates about your travel program in the past year in any of the following areas?



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

**“We currently have a culture of exceptions for everything. We are hoping to change that not only for the spend benefit to the company but for the safety of the traveler.”**

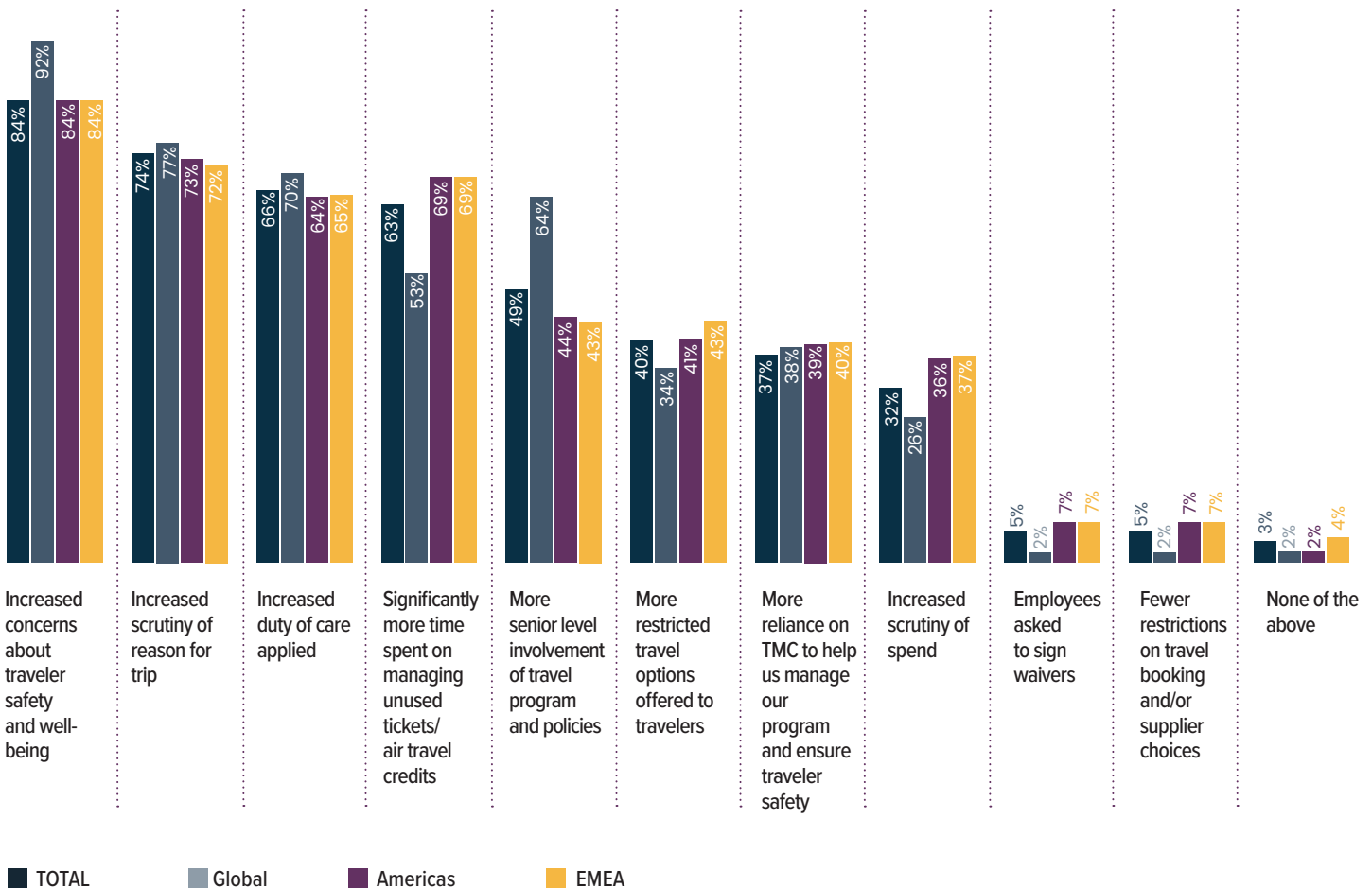
– Travel Manager

## CHANGES IN TRAVEL MANAGEMENT

With the pandemic still spreading globally, it's no surprise that eight in 10 respondents (and nine in 10 with a global program) cited increased concerns about traveler safety and well-being as the biggest change in the past year. Nearly three quarters mentioned increased scrutiny of reason for trip as the biggest trend, and two thirds stated increased duty of care. Still, months after trips were abruptly canceled or postponed, six in 10 also said they are spending significantly more time managing unused tickets and air travel credits. **Chart 3**

**Chart 3**

What aspects of your travel management program have changed the most in the past year, whether due to COVID-19 or new corporate priorities?



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

There is little doubt that programs are getting tighter, not looser, even if travelers prefer more independent options. Roughly half of respondents have seen more senior level involvement of travel program and policies in the past year. With travel companies putting the reigns on spending and a watchful eye on safety, only 5% of respondents have seen fewer restrictions on travel booking or supplier choices.

Business traveler habits are hard to break, and many road warriors have their own preferred suppliers or booking methods. With a greater emphasis on management, travelers need to think differently about how, where and when to book. Nearly three quarters of respondents said their travelers will need to be retrained on policy, practices and safety once travel resumes. The reasoning, for 68%, is that the travel program has become far more complex with travel restrictions, protocols, reporting, and other changes. This is especially true for those companies shifting from a lightly managed to managed program. And these aren't just temporary shifts – 63% of respondents said their travel program is forever changed as a result of COVID. **Chart 4**

### SAFETY OVER SAVINGS?

Even as companies tighten travel budgets in anticipation of economic fallout from the pandemic, increased scrutiny of spend was not among the biggest trends of the past year, ranking eighth. **Chart 3** But companies haven't forgotten about their bottom lines, and this a new opportunity to streamline costs. Four in 10 respondents are making changes in their travel program to drive more cost savings. **Chart 6** And seven in 10 said savings is a key performance indicator for their travel management program in 2021.

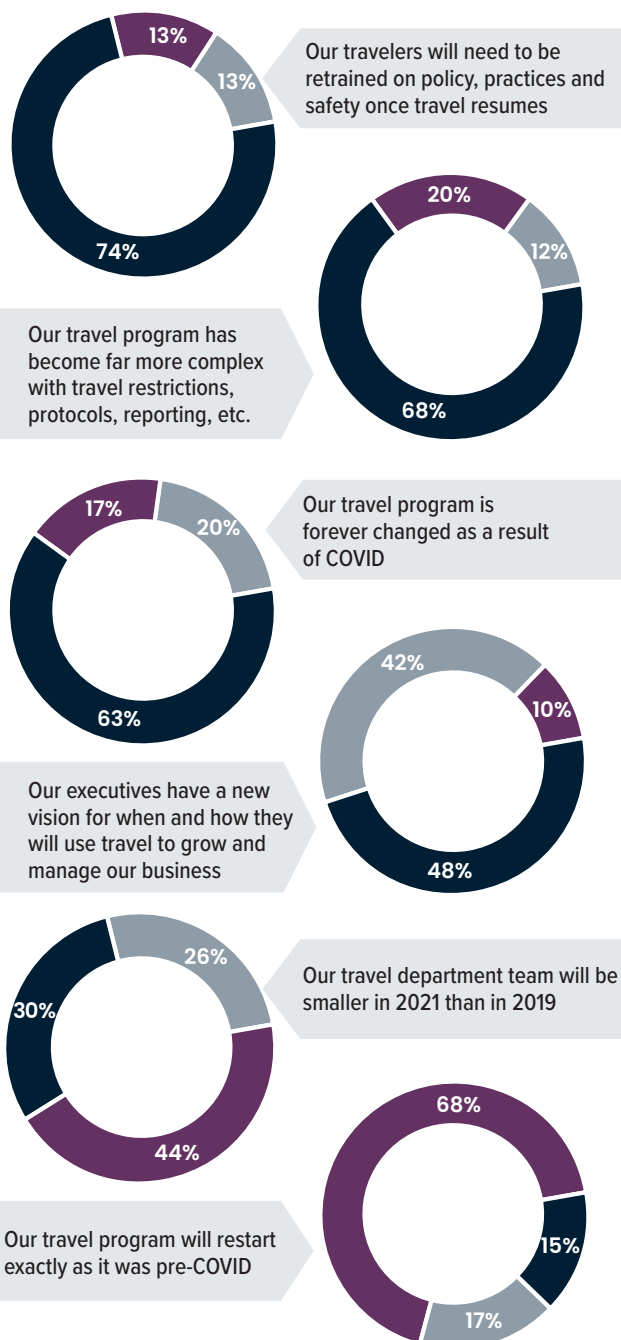
**“Training will be used to address our guidance and use of virtual options.”**

– Travel Manager

### Chart 4

How much do you agree with each of the following statements?

■ Agree ■ Neutral/Unsure ■ Disagree



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021



### WHAT'S ESSENTIAL

Scutinizing trips, limiting travel and ensuring traveler safety are now front and center. For three quarters of respondents, defining essential travel is the biggest change to their program. Duty of care programs ranked second (65%). Nearly six in 10 also cited an increased focus on traveler well being (59%).

#### Chart 5

When pressed on which duty of care measures they were adopting, six in 10 said adding more health and safety information to the company website/app for travelers to review on their own. Nearly half said adding additional approval levels for trips to certain geographies. **Chart 6**

Pre-trip approvals, though not on the list, were also top of mind for respondents, with one travel manager demanding “a higher justification for trip approval vs. use of virtual meeting options.”

### Chart 5

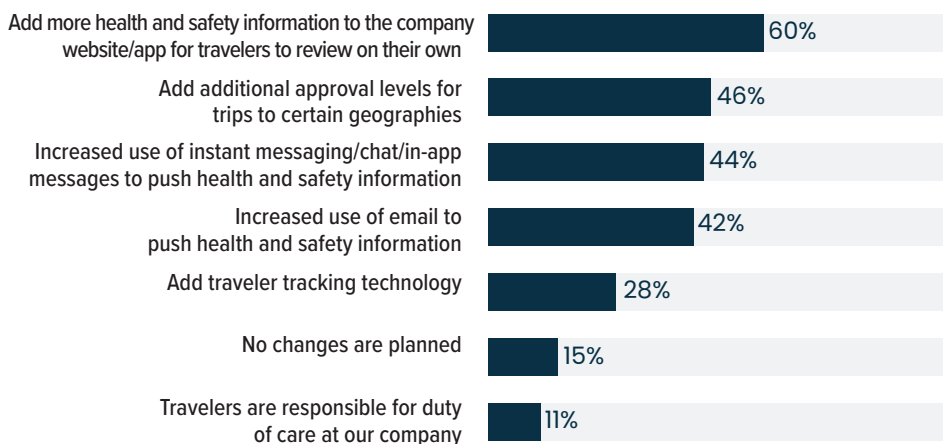
Is your company making any of the following changes to its corporate travel program?



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

### Chart 6

What changes do you plan to make to your duty of care programs over the next 12 months?



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

## REINVENTING YOUR MANAGED TRAVEL PROGRAMS

### TOP BUSINESS PRIORITIES

These transformational trends were made even clearer when considering respondents' top business priorities. Six in 10 cited risk mitigation and increased focus on traveler safety/duty of care as one of their top three priorities, including seven in 10 with a global program. Four in 10 chose increased policy compliance and providing more guidance to travelers of when to travel (vs. using virtual options). Once again, companies find it's more urgent to put a structure around trip approval than track spend at this time, especially since there is little travel happening anyway. Only three in 10 respondents chose increased cost savings as one of their top three priorities. **Chart 7**

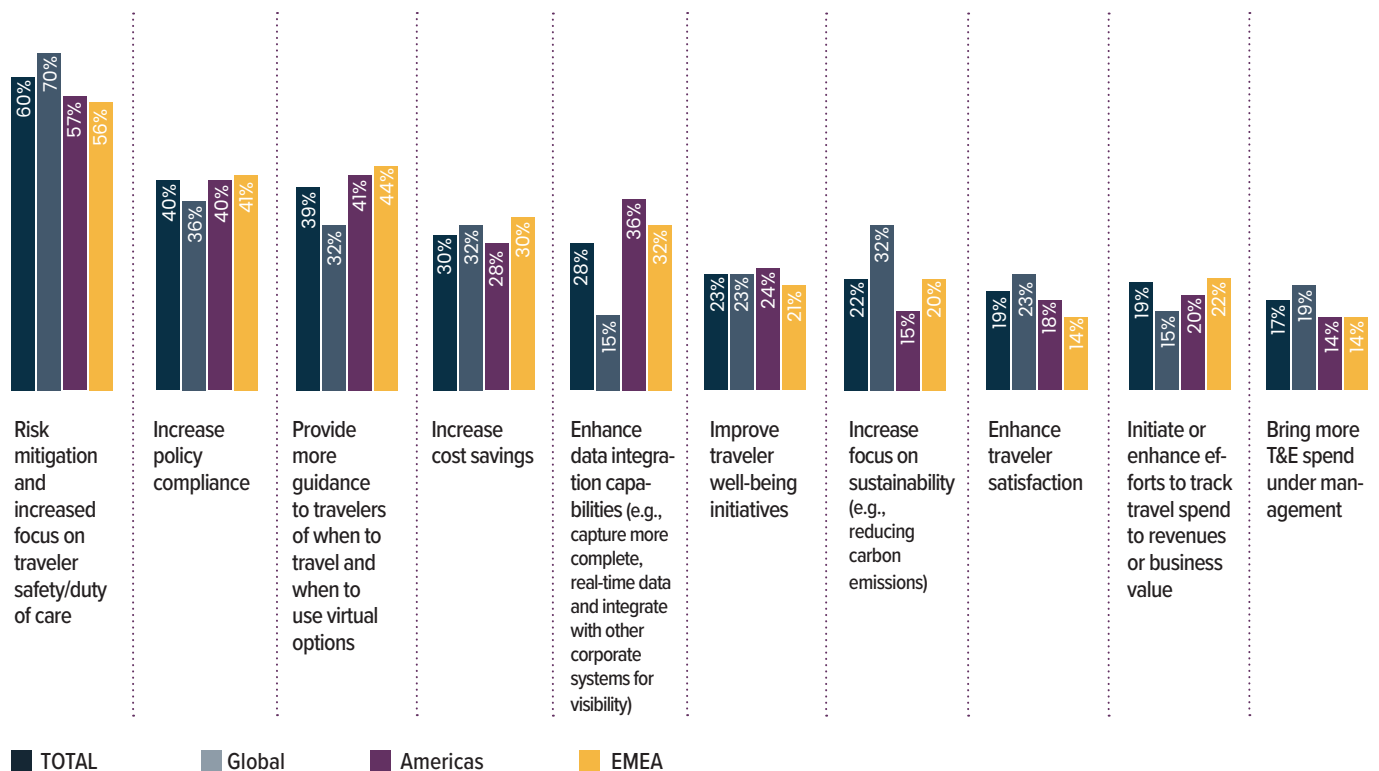
The majority of respondents believe COVID has caused perma-

nent change to their travel program. Their priorities, rooted in the pandemic, are here to stay—at least for the next two years. The top two objectives—risk mitigation and increased compliance—are both expected to increase in significance in 2021-22, according to 55% of those who chose them.

Has the role of technology taken a back seat to mandates/duty of care during times of COVID? Not for all respondents. Though further down the list of priorities, 65% of those who chose “enhanced data integration capabilities” believe it will grow in importance over the next 18 months. Those who highlighted sustainability are also passionate, with 64% of those who chose it as a priority noting it will grow in importance over the next two years.

**Chart 7**

What are your top three strategic business priorities for your company's managed travel program this year?

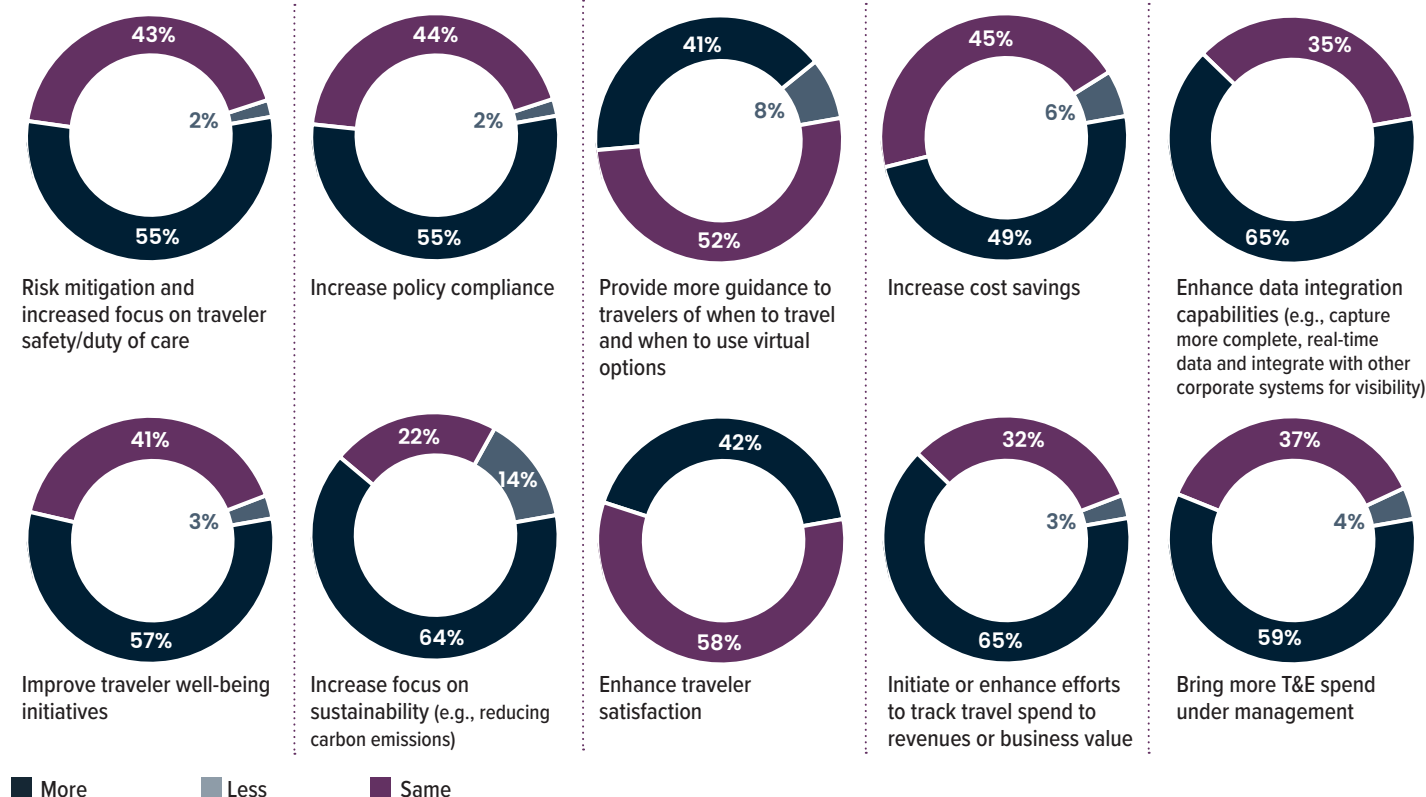


Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021



## Chart 8

Will the top priorities you identified be more, less, or same in importance into the latter half of 2021 and 2022?  
Ranked by Top 3 Priorities from Chart 7



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021, with 49 responses to this question

**"For data integration, we are moving to a new OBT and agency. For duty of care, we have expanded our hotel scoring capabilities to track for cleanliness. Travel spend will be tightly tracked for 2021 and 2022."** – Travel Manager

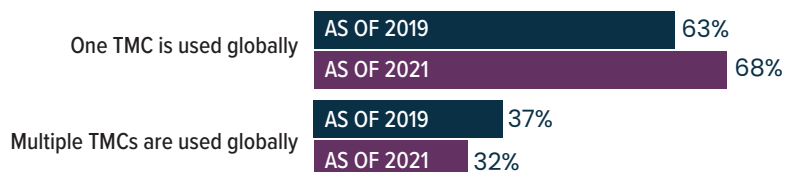
## DEMANDS ON THE TMC

With less travel to manage and greater demand for consistency, companies are cutting back on the use of multiple TMCs for their global program. As of 2021, 68% of respondents used one TMC globally compared to 63% in 2021. **Chart 9**

Fewer TMCs means that more demands are made on current partners. With tighter programs and shifting priorities, companies have set new expectations for services provided by their travel management company. The highest priorities for 2021-22 – duty of care, customer service, savings, technology and on demand reporting – have all grown significantly since one year ago. **Chart 8**

## Chart 9

Which option best reflects the TMCs your company used for each of the following timeframes:



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

## REINVENTING YOUR MANAGED TRAVEL PROGRAMS

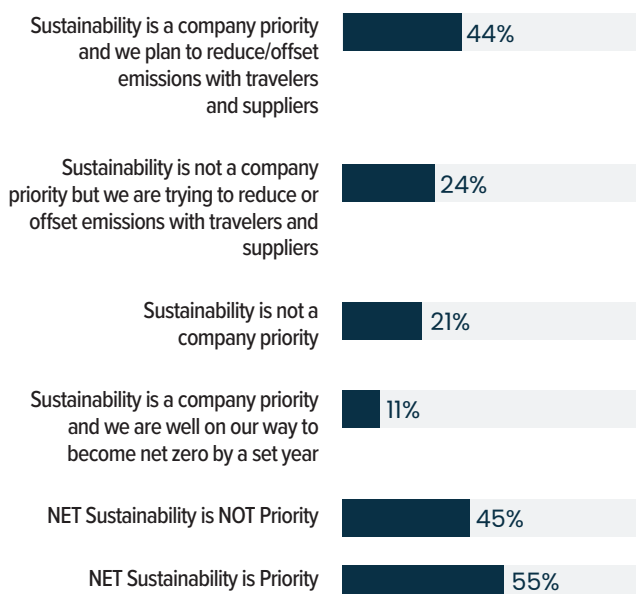
Expectations for technology have always been high, but have taken on even greater importance since the pandemic. Consider that less than half of respondents thought technology was a priority in 2020, while now seven in 10 respondents do. And one-fifth said it was enough of a priority to prompt an RFP. Also, on demand reporting was a required service by 46% of respondents in 2020, but 68% consider it a priority over the next 12-18 months. Besides technology, nearly one in five respondents said customer service and savings were important enough to provoke an RFP.

### PRIORITIZING SUSTAINABILITY

As the world watched the earth begin to renew itself during lockdown, companies have taken a renewed interest in responsible travel. More than half of respondents said sustainability is a company priority, and they plan to reduce/offset emissions with travelers and suppliers. These companies are the most passionate about building sustainable options into the booking flow. Meanwhile, half of those respondents who did not prioritize sustainability said they are still moved to action by trying to reduce or offset emissions with travelers and suppliers. Achieving these goals requires help from their TMC, now more than ever. **Chart 10** Consider that in 2020 only 18% of respondents said it was important for TMCs to prioritize “sustainability offsets to help meet company goals” but 48% consider it important for 2021-22. And more than half also plan to have sustainable reporting in place by 2021-22. **Chart 11**

### Chart 10

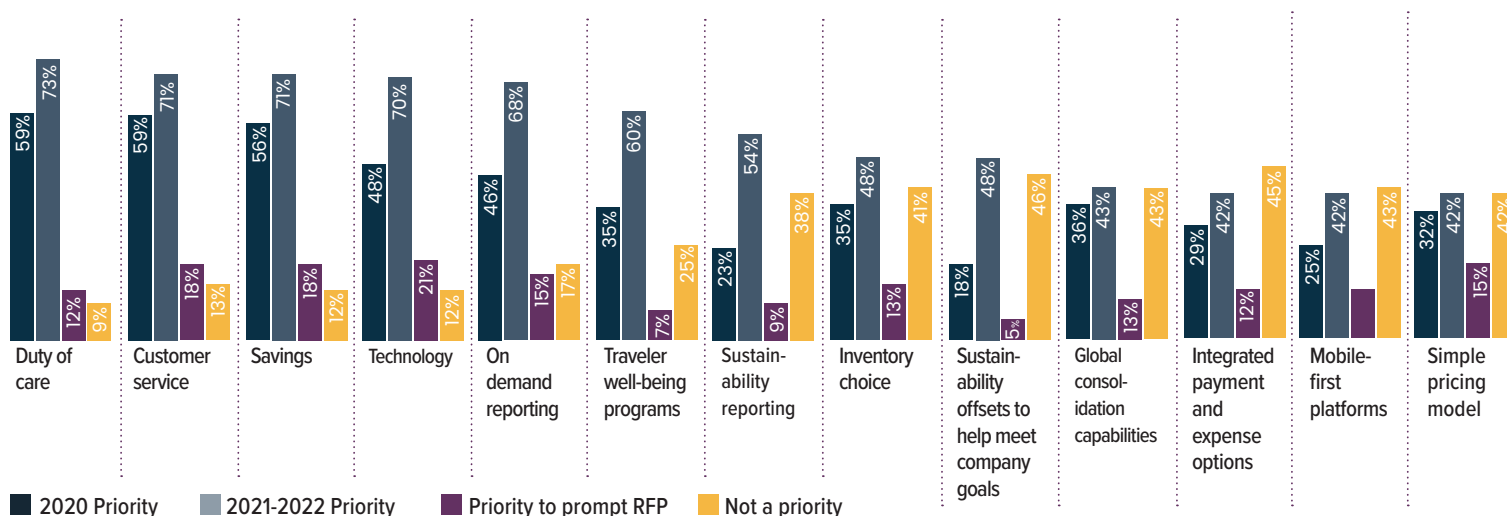
Which of the following sustainability measures best represents steps your organization is taking?



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

### Chart 11

Of the following services provided by travel management companies, indicate services that were 2020 priorities for your company, priorities over next 12-18 months and services that would prompt you to go out for bid. *Ranked by 2021-2022 Priority*



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

### TECH AND AUTOMATION

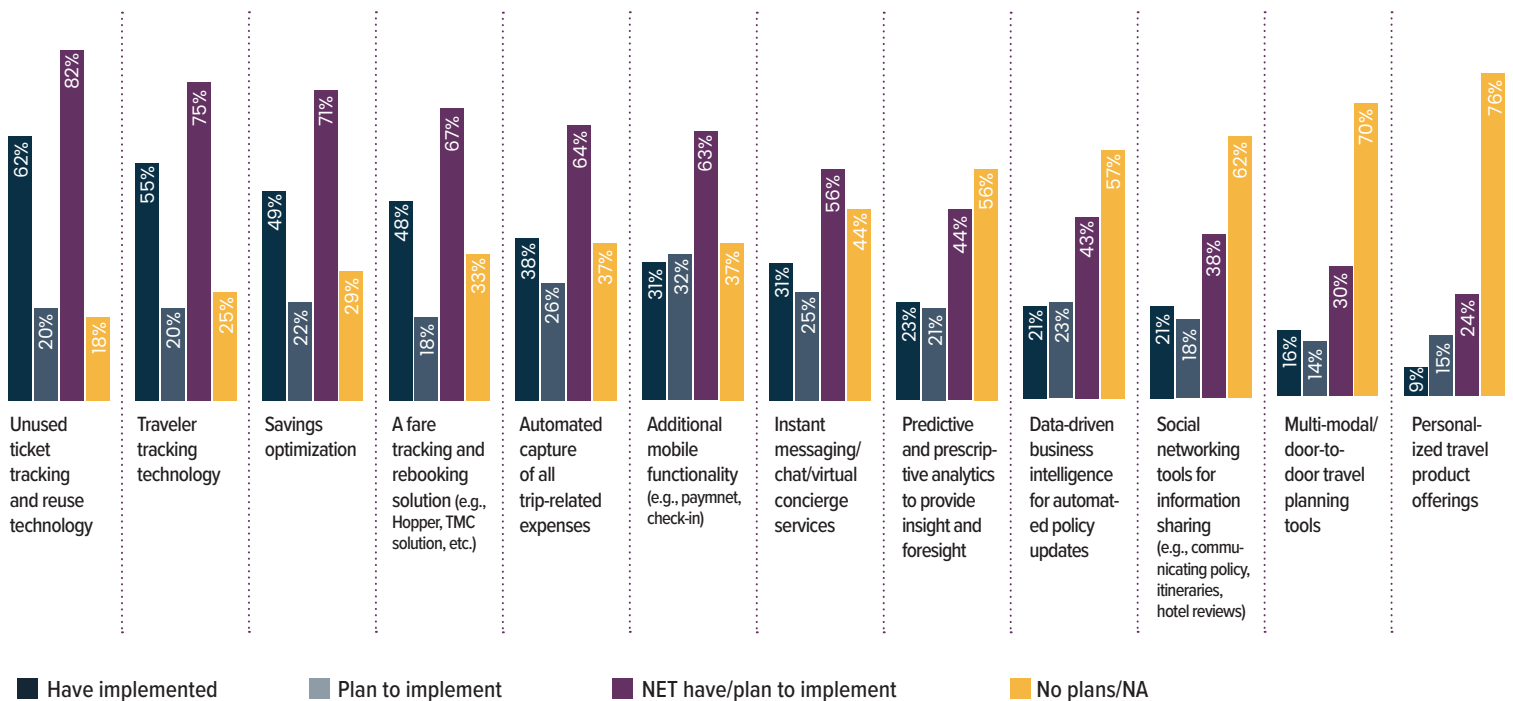
It is no wonder why companies are looking for TMCs to assist them with their top technology initiatives, including automating their most necessary processes. More than eight in 10 respondents have or plan to implement unused ticket tracking and reuse technology. And more than seven in 10 also cited traveler tracking technology and savings optimization as key initiatives.

**Chart 12.** One quarter also plan to implement Artificial Intelligence/Machine Learning solutions to assist with data-driven decisions, but six in 10 have no plans. **Chart 13**

**“We will rely on more innovative tools to better calculate, track, report and dashboard our sustainability efforts from an enterprise perspective down to the individual traveler.”** - Stakeholder

**Chart 12**

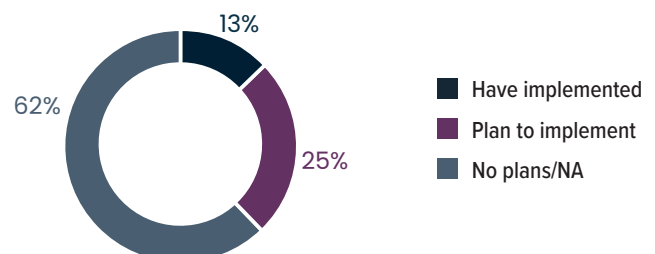
What technology initiatives have you implemented or do you plan to implement for your company's managed travel program? Ranked by NET Have/Plan to Implement



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

**Chart 13**

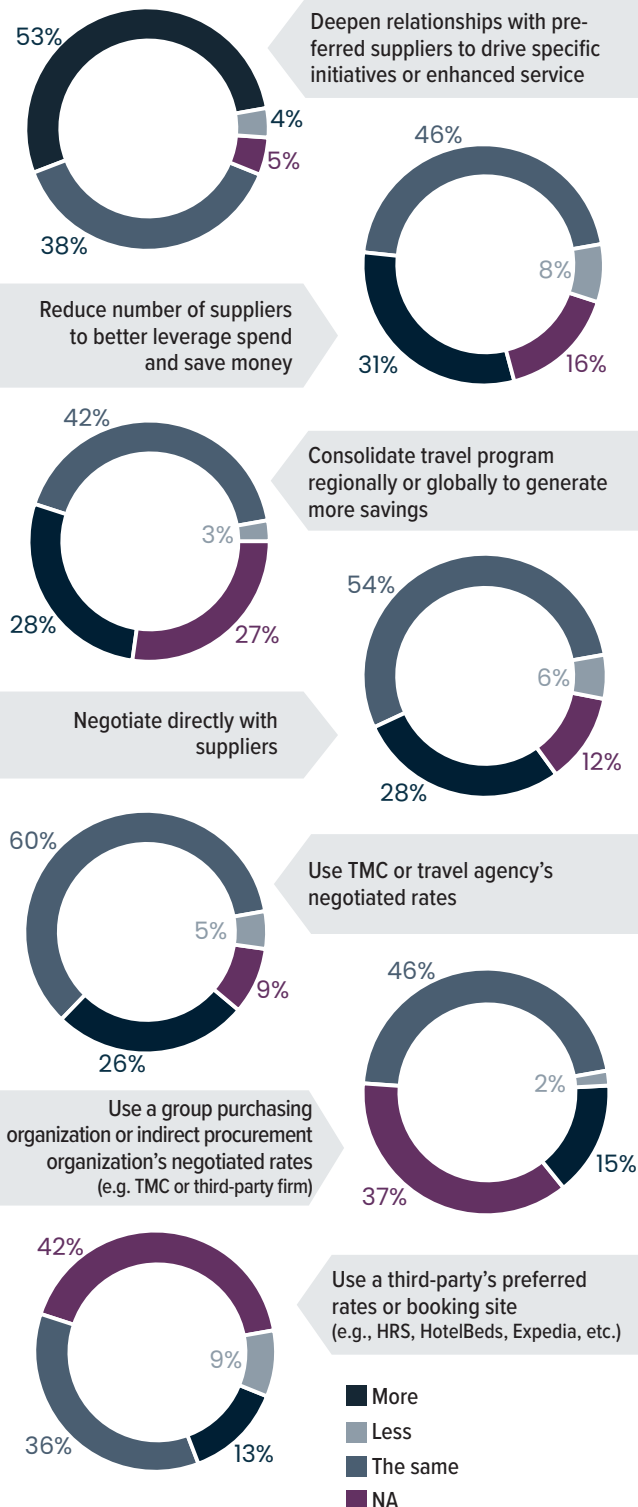
Is your organization using artificial intelligence/machine learning solutions to assist with data-driven decisions?



Source: The BTN Group / Egencia “Reinventing Your Managed Travel Program” online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

## Chart 14

What changes if any do you expect in sourcing supply in 2021?



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

## SUPPLY CHAIN INITIATIVES

In terms of sourcing supply, more than half of respondents said it's important to deepen relationships with preferred suppliers to drive specific initiatives or enhanced service. And most respondents plan to reduce or maintain the number of suppliers to better leverage spend and save money. For six in 10, it's status quo for using a TMC or travel agency's negotiated rates.

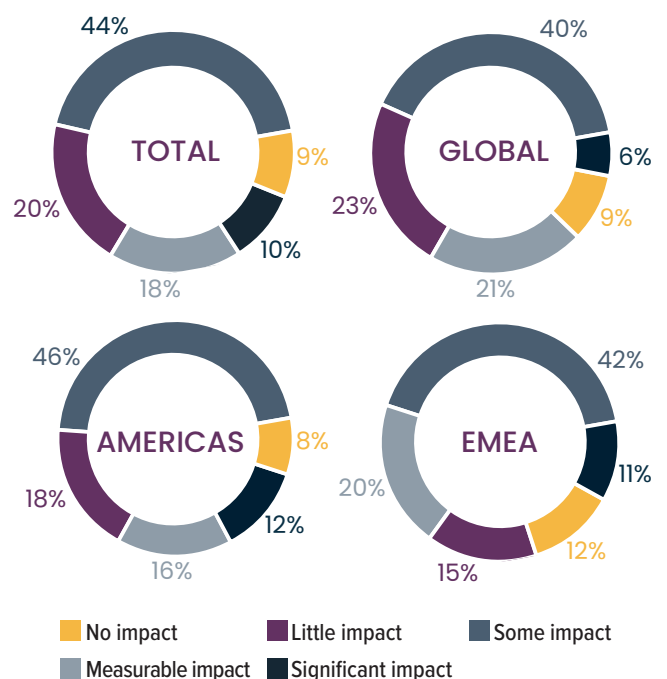
Chart 14

## CULTURE SHOCK

Road warriors are getting restless and want to get back on the road to see colleagues, clients and prospects. Corporations are taking the most conservative route of keeping employees at home and assessing each trip while recommending virtual options, leading some to wonder when they might again step foot into an airport. Therefore it's rational to assume that employee morale will be impacted. The largest percentage of travelers in all regions said the decrease in travel in 2020 had impacted company culture, including seven in 10 of those with a global program. **Chart 15.** The biggest reason: Employees miss the comradery of meeting with colleagues at industry and internal meetings. **Chart 16**

## Chart 15

Has the decrease in travel in 2020 impacted your company culture?



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

## Chart 16

Which statement(s) best describe the impact of reduced travel on your company culture and morale?



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

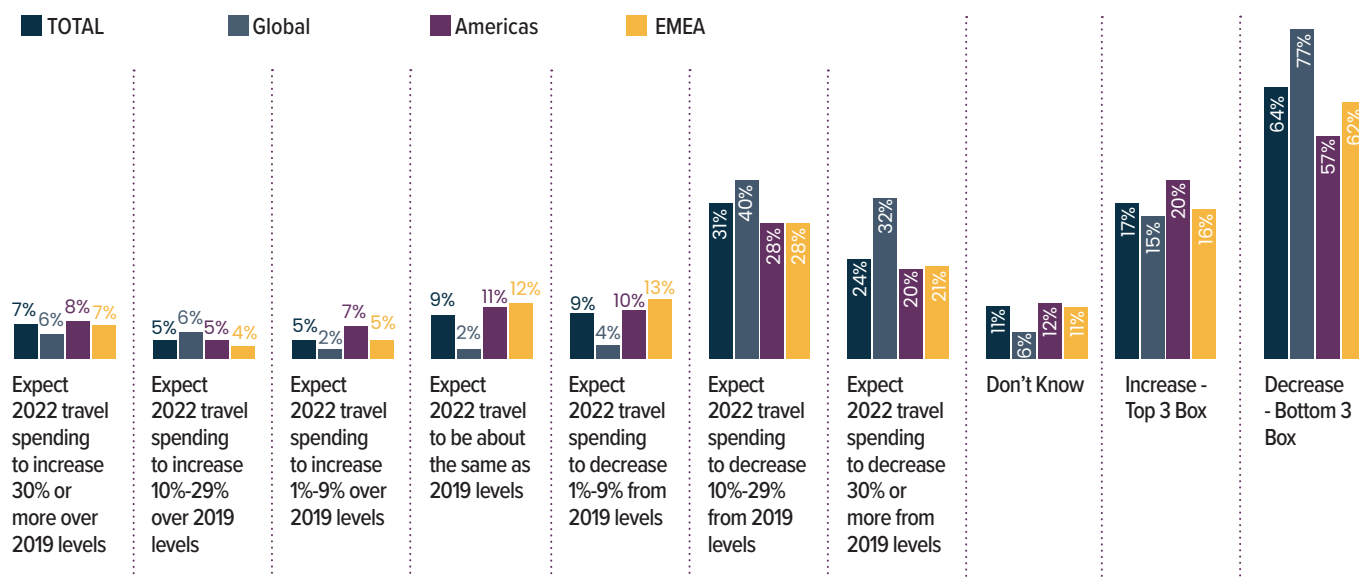
## NEW RULES

Tighter programs, stricter rules, more accountability... Companies are going to have to live with these trends for awhile. Six in 10 respondents expect 2022 travel spend to still be below 2019 levels. **Chart 17** And with improved virtual meetings technology, face to face gatherings will have to prove their worth. More than six in 10 respondents said they are providing guidance in online booking

tools with links to virtual options instead of travel. **Chart 18** Virtual options are here to stay, but not all travel will be replaced by screens. While less travel can mean cost savings and lower safety risk, certain types of business travel are bound to return, essential or not. For sure, when business travelers do step out again, there will be new rules to guide them.

## Chart 17

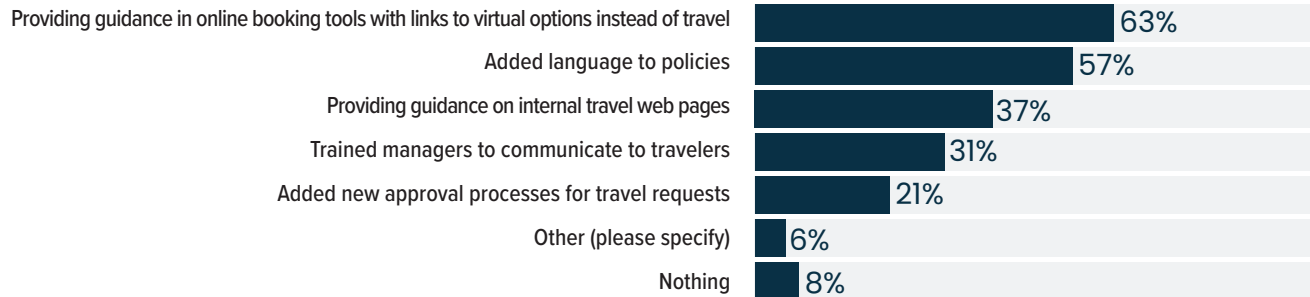
By the end of 2022, how much of your company's pre-COVID travel spend do you anticipate will be recovered as compared to 2019 spending?



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

## Chart 18

When it comes to guiding travelers on when and how to travel or attend meetings, what is your company doing?



Source: The BTN Group / Egencia "Reinventing Your Managed Travel Program" online survey of 164 travel managers and other stakeholders in The Americas and EMEA fielded January 26-February 16, 2021

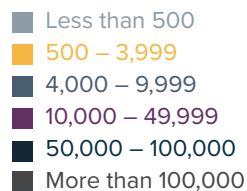
## METHODOLOGY

The BTN Group Content Solutions team and Egencia explored how key corporate travel decision-makers, specifically, travel management, procurement, finance, human resources and risk management think about business travel moving forward and ways they are advancing programs with digital transformation. The survey was fielded to The BTN Group's North America and EU databases, as well as Egencia's database in winter 2021, resulting in 164 total responses. Only responses from corporate travel executives with managed travel programs (mandated or optional) are included in results.

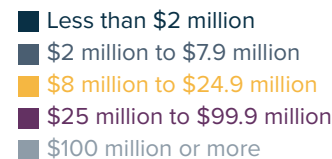
## DEMOGRAPHICS

	Program Geography/Role		
	Americas	EMEA	Global Geography
Travel manager, director, VP, etc.	77%	77%	72%
Procurement manager, director, VP, etc.	14%	16%	21%
Finance, expense manager, director, VP, etc.	6%	1%	2%
Human Resources, shared services, risk, etc.	3%	6%	4%

## COMPANY HEADCOUNTS



## COMPANY ANNUAL TRAVEL SPEND AS OF 2019



Produced by:

**BTNGROUP**  
CONTENT SOLUTIONS

**Mary Ann McNulty**

Executive Director, Content Solutions  
mmcnulty@thebtngroup.com

**Lorraine Sileo**

Writer

**Louis Magliaro**

Executive Vice President & Group Publisher  
lmagliaro@thebtngroup.com

**Lindsay Straub**

Associate Publisher  
lstraub@thebtngroup.com

**Mariza Moreira** / Group Design Manager

**Angelica Mundrick** / Graphic Designer

## About Egencia

Egencia is the world's corporate travel solution. We help businesses optimize their travel programs for today's fast-changing landscape – controlling risk, supporting traveler wellbeing and maximizing ROI. Companies of all sizes in more than 60 countries trust Egencia to modernize their corporate travel programs with consistent, innovative experiences and fast, expert support. We bring the power of Expedia Group to deliver simple, consumer-like business travel that users love.

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