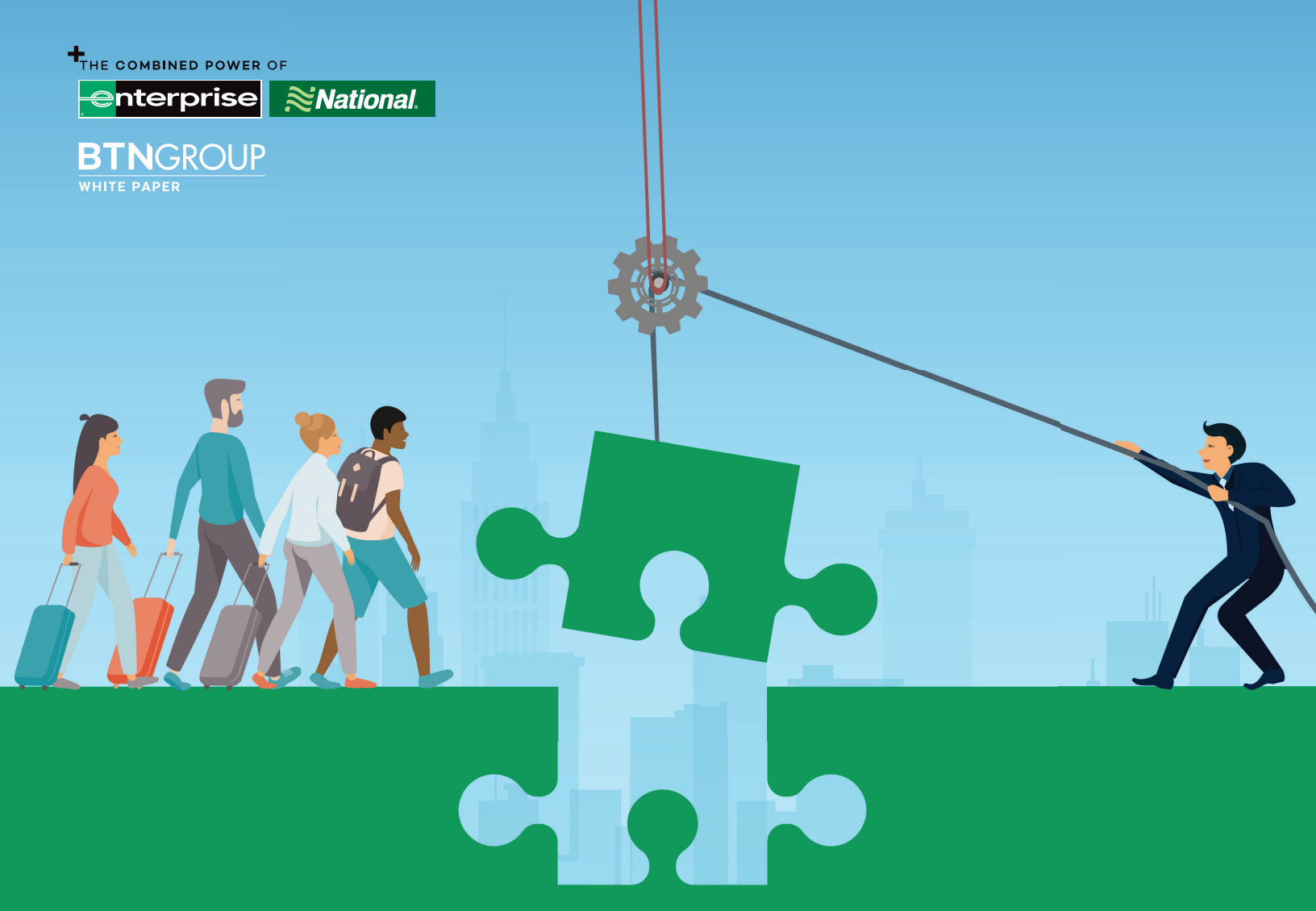


THE COMBINED POWER OF



BTNGROUP
WHITE PAPER



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

OVERVIEW

With the latest labour 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 traveller expectations?

The pandemic forced travel programmes 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 travellers' expectations change, and will corporate travel policies migrate more toward cost savings or traveller satisfaction? What changes from the pandemic might become permanent?

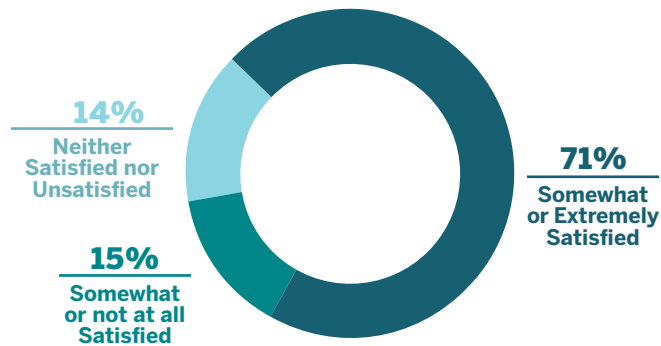
To better understand the mindset of travellers and travel managers alike, The BTN Group, in partnership with sponsor Enterprise Holdings Inc., conducted separate surveys of each group, obtaining a snapshot of the current state of global business travel affairs and exploring expectations as more companies return to business travel. The results reveal where travellers 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 TRAVELLER EXPECTATIONS

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

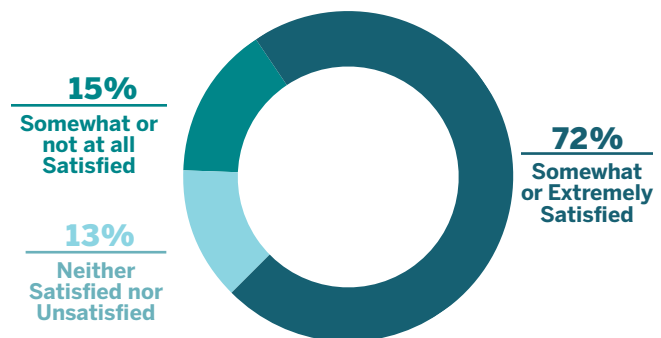


SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveller Expectations In New Era of Managed Travel" online survey of 323 frequent business travellers in managed programmes, conducted in October 2021



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

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



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



Nearly three-quarters of travellers are currently satisfied with their companies' travel policies and feel the policies help them achieve their business goals. For business travellers, 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 travellers, but most travel managers said their programmes 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 travellers happy will be a challenge as travel increases. One commented: "Travellers 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 traveller expectations may fall heavily upon supplier partners, some of whom are facing labour shortages and supply chain problems. But it also may be about giving travellers more choices and information—both before and during travel.

Read on for a deeper dive.



Business Traveller



Travel Manager



3 / BALANCING TRAVELLER SATISFACTION WITH OTHER DEMANDS

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

Balancing cost savings / budgets with employee demands to travel



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



Providing suppliers with accurate forecasts on travel volume and traveller expectations



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



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



Meeting more demanding traveller expectations for more choices



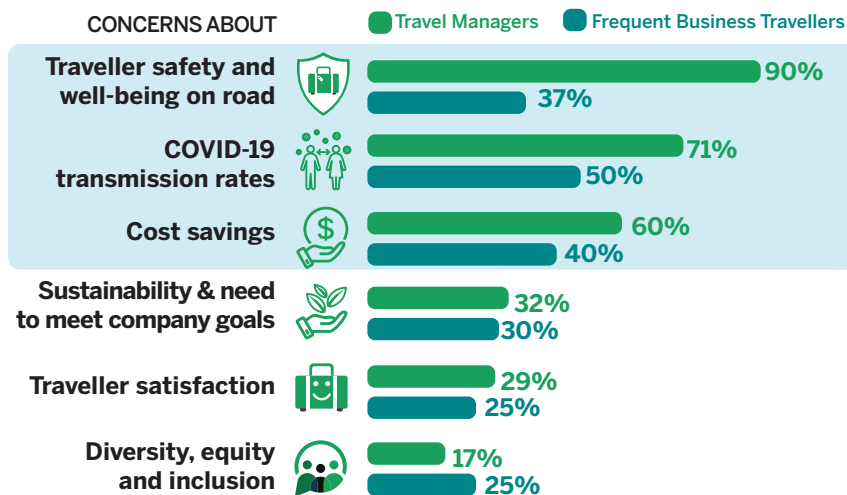
SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveller Expectations In New Era of Managed Travel" online survey of 106 travel, expense, finance, procurement or other executives responsible for managed travel, conducted in October 2021

MANAGED TRAVEL IS CHANGING

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

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

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



TOP 3 DRIVERS prompting most of the changes in company programmes



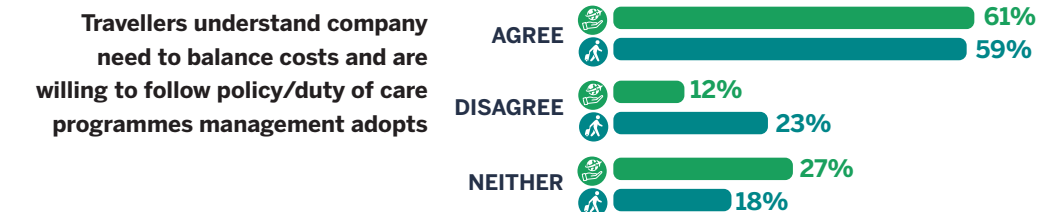
SOURCE: BTN Group / Enterprise Holdings Inc. "Meeting Business Traveller Expectations In New Era of Managed Travel" online survey of 106 travel, expense, finance, procurement or other executives responsible for managed travel, and 323 frequent business travellers in managed programmes, both conducted 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 traveller survey said they were ready to begin travelling more frequently, no matter how challenging it might be for duty of care. One in four travellers thought their company's priority around traveller safety and well-being was too high. Nearly **six in 10 travellers** indicated they were prepared to accept whatever travel policies management adopted.

5 / BALANCING COMPANY AND TRAVELLER CONCERNS

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



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

HOW TRAVEL PROGRAMMES INFLUENCE THE TRAVELLER EXPERIENCE?



6 / COMPANY DUTY OF CARE, TRAVEL PROGRAMMES POSITIVELY INFLUENCE TRAVELLER EXPERIENCE

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



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

The BTN-Enterprise research found that business travellers are now largely satisfied with current travel policies—if still a bit leery about travelling while new cases of COVID-19 are still being reported. Nearly three-fourths of travellers expressed satisfaction with their companies' travel policies and duty of care programmes. 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 programmes management adopts.

Our research identified some lingering unease among travellers about taking business trips during the pandemic. More than six in 10 said they planned on travelling 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: Travellers 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 travellers 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 travellers 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 travellers 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 travellers 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 travellers said that was so. Two of five business travellers cited more choices on ground transportation options, ability to add leisure days to business trips and trip durations.

Explaining how travellers have more choices in their programmes, 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 personalised 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 programmes already allow travellers 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 travellers.

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



7 / TOP FIVE TRAVELLER WANTS

What is not included now in your company's programme 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 Traveller Expectations In New Era of Managed Travel" online survey of 323 frequent business travellers in managed programmes conducted in October 2021.

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

travellers 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 travellers typically have normal expectations of such policies, but just one-quarter said travellers expect that companies validate the safety/security of travellers' short-term rental bookings.

More than half of business travellers 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 travellers voiced plenty of requests for more choices in lodging, including more budget options.

8 / HOW POLICY MANDATES INFLUENCE TRAVELLER EXPECTATIONS

Do Policy Mandates on Lodging Lower or Raise Traveller Expectations?

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

■ LOWER EXPECTATIONS ■ NORMAL EXPECTATIONS ■ HIGHER EXPECTATIONS ■ NA

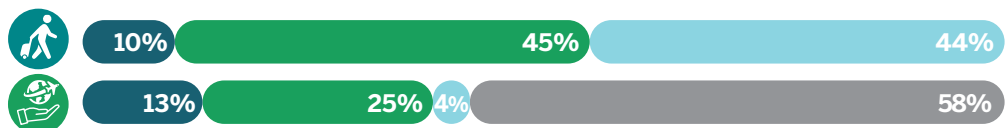
When my company's lodging policy requires me to use a specific brand, my expectations are:



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:

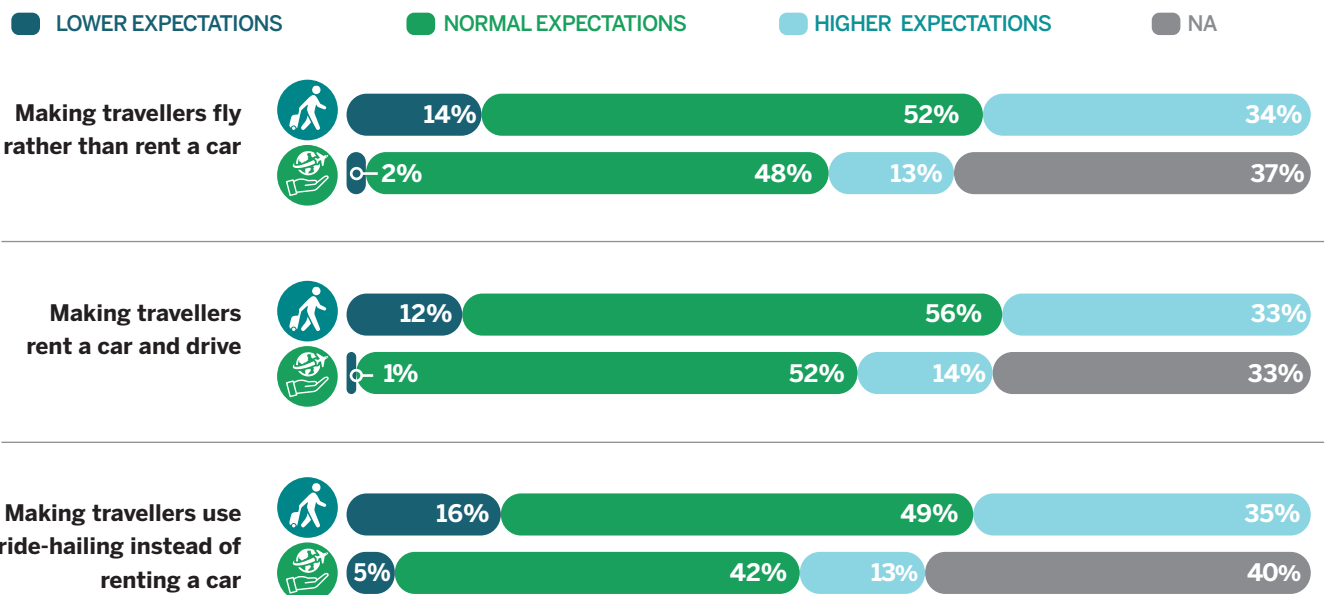


The BTN-Enterprise research also examined three company policies governing modes of travel: requiring travellers to fly rather than drive, requiring them to drive and requiring them to use a ride-share instead of a rental car. Of business travellers who said they have normal expectations of policies 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 traveller transportation needs? "Let me have more freedom in deciding how I would like to travel," said one business traveller. 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 TRAVELLER EXPECTATIONS?

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



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

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



SAFETY & WELL-BEING



COST SAVINGS



TRAVELLER CONVENIENCE



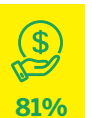
TRAVELLER COMFORT

10 / PROGRAMME 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 travellers are largely satisfied with their companies' travel policies. That's certainly the case with duty of care. Nearly six in 10 travellers (58%) indicated that duty of care programmes 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 travellers as part of the duty of care programme arose in the BTN-Enterprise research as a potential area for travel managers to improve.

Study findings reveal a disconnect in perceived effectiveness of traveller communications between travel managers and business travellers. With nearly six of 10 business travellers indicating that the duty of care programme left a positive impression on them, just over half (54%) said their company was effective in informing travellers 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 travellers said their companies were ineffective in making them feel informed about the changes. In contrast, only one in 10 travel managers rated their programmes as ineffective. Nearly eight in 10 travel managers thought their company was effective with informing travellers prior to

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



11 / HOW TRAVEL POLICIES IMPACT TRAVELLERS' 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 Traveller Expectations In New Era of Managed Travel" online survey of 323 frequent business travellers in managed programmes conducted in October 2021

12 / TRAVELLER VIEWS OF DUTY OF CARE PROGRAMMES

MY COMPANY'S TRAVEL PROGRAMME 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 travelling 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 Traveller Expectations In New Era of Managed Travel" online survey of 323 frequent business travellers in managed programmes 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 programme deliverables that travelling employees depend on to effectively do their jobs on the road. Our research provides important data for accomplishing that balancing act.

Business travellers 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. Travelling 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 travellers feel ambivalent about travelling during a period of unknown risk and expect their companies to prioritise their safety and well-being as much as they do. As they begin taking business trips once again, travellers will likely experience greater levels of traveller friction than they're accustomed to. To help mitigate this, travel managers must remain carefully attuned to their travellers' concerns and preferences.

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

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

build traveller confidence with the new realities of business travel. From airport security and boarding protocols to COVID-testing and mask-wearing, hotel checkin to housekeeping, travellers need to know the new rules of travel. Travellers 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 programme changes or duty of care provisions to ensure travellers understand the drivers of their programmes.

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

To some extent, winning over travellers may be less about increasing travel budgets than about letting travellers weigh in on their needs. Indeed, several traveller managers noted that they haven't yet asked travellers what they want and expect in 2022. Travellers 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 travellers 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

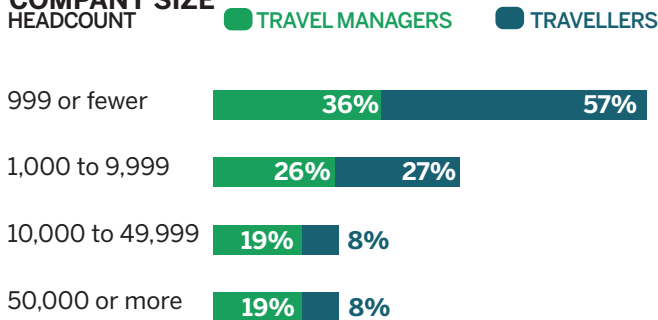
go a long way toward keeping travellers satisfied.

SURVEY METHODOLOGY AND DEMOGRAPHICS

The BTN Group Content Solutions fielded an online survey about managed corporate travel programmes and travellers in October 2021 to corporate travel and expense decision-makers responsible for managed travel within their organisations. 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 travellers who must follow travel policy or guidelines with 323 qualified respondents. To qualify, business travellers had to travel at least 50 miles from home in 2019 with at least one overnight stay domestically or internationally.

COMPANY SIZE HEADCOUNT



SOURCE: The BTN Group / Enterprise Holdings Inc. "Meeting Business Traveller 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 travellers, both conducted in October 2021.

GEOGRAPHIC REACH OF PROGRAMMES AND BUSINESS TRAVEL

Where managed travel programmes operate for respondent travel managers and travel destinations of frequent business travellers in 2019.

	Where managed travel programmes operate for respondent travel managers	Travel destinations of frequent business travellers 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 Traveller

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