The Evolution of Travel Programme Technology
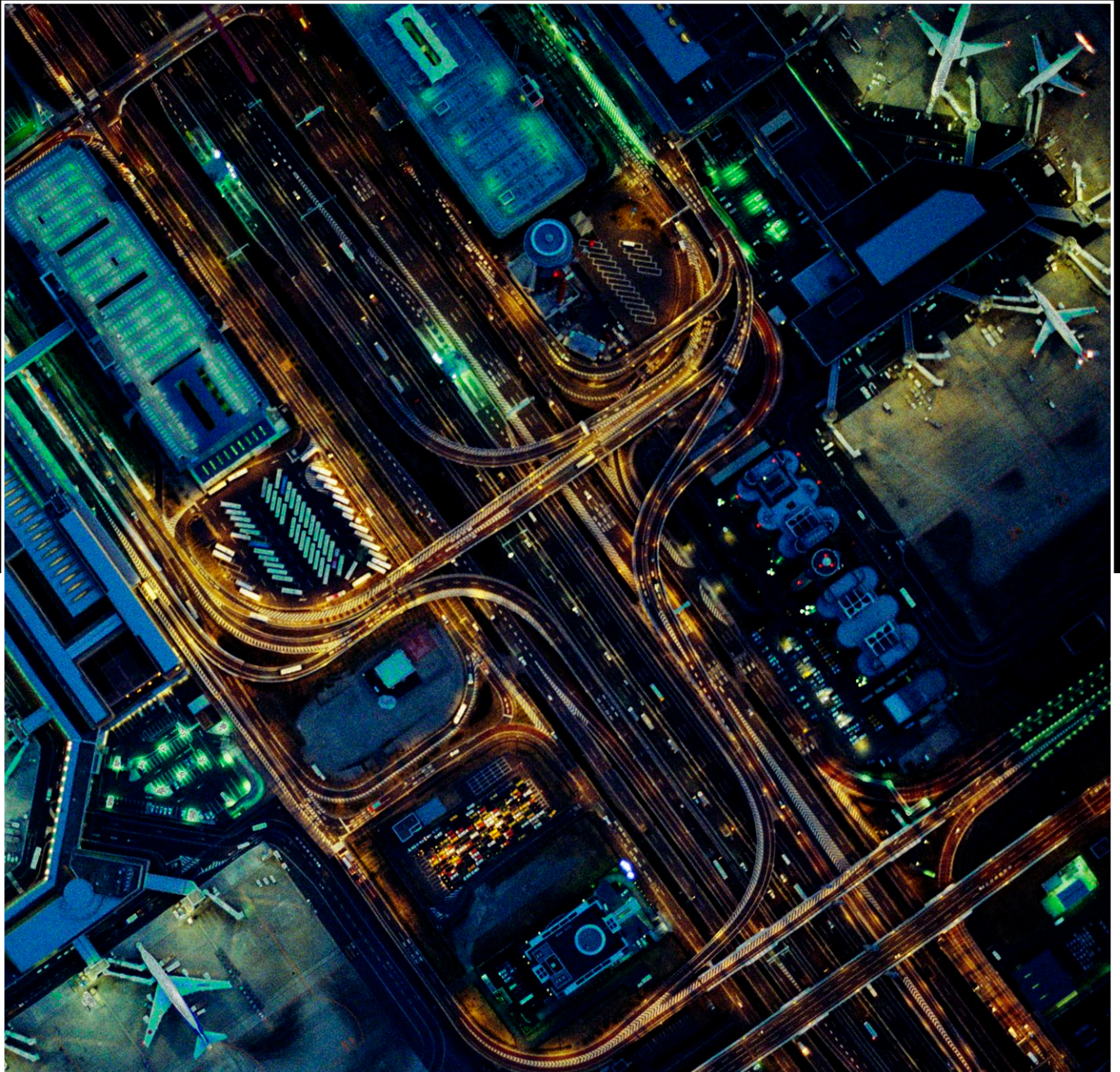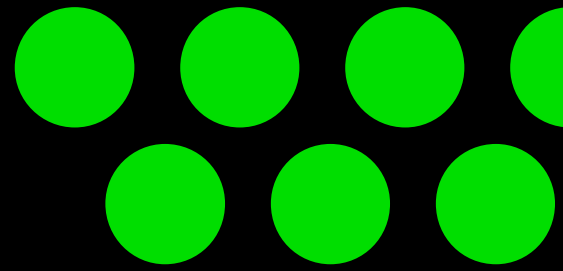
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Introduction

As the world starts to climb out from the pandemic and resume more routine norms in terms of work, companies and offices are opening and employees have begun to return to business travel. But as the business travel industry recovers, headwinds such as inflation, COVID-19 infection spikes, and lockdowns are impacting the global economy, which in turn impacts the industry.

Yet despite these headwinds, companies are moving forward to strengthen their travel programmes to include changing or updating travel policies, assessing technology needs after, and revisiting suppliers (including travel management companies or TMCs).

After a pause of business travel for almost two years, it is important to assess the state of technology used by travel programmes to see how, if at all, needs have changed.

- Do travel managers feel their programme's technology is sufficient? Have technology needs changed since 2019?

- What do travel managers need from travel technology and are those needs what travellers need (and want) when they are on the road?

- What technology features are used by travel programmes?

- What is the role of the TMC and their technology solutions in this new phase of the pandemic?

This study explores how has technology changed (a) the travel manager's role and (b) travel programme-TMC relationships.

It is based on a survey of North American, European and Asia-Pacific travel managers – including current and former members of GBTA – and addresses several key topics including:

1. **How has technology transformed the role of the travel manager and TMC:**
   How technologically savvy are travel managers? How has technology changed the role of a travel manager? Are travel managers satisfied with the technology used by their programme?

2. **Travel management companies:** What are the most important factors when choosing a travel management company (TMC)? Do travel managers give more weight to technology than other considerations – such as customer service or fees – when selecting a TMC for their company? What are the biggest strengths and

pain points of the primary TMC used by travel managers and their programme? What are the travel technology strategies at companies? How many TMCs do travel programmes use worldwide?

3. **Adoption of travel tech:** How tech savvy are employees? What technologies do travel programmes currently use? What travel technologies are offered to employees?

4. **Tech trends:** What is the state of NDC, mobile apps, and AI within travel programmes? How aware are travel managers of these new features? What is their interest in these technologies?

Key highlights

- **Technology is the most important factor when travel managers select a TMC, ahead of costs/ fees, account management quality, and support.**
Three in five (59%) travel managers include technology as one of the most important factors when selecting a TMC. However, 2 in 5 respondents (42%) include technology as one of the top pain points of their primary TMC.

- **Almost all travel programmes (96%) use an online booking tool (OBT), and as such, is the most popular technology component of a travel programme.**
However, other technology solutions are less frequent including reporting dashboards, TMC mobile apps, re-shopping tools, and single-use virtual payments to name a few. This suggests many travel managers might largely associate travel technology almost exclusively with OBTs and thus, might be unaware of other solutions that can create efficiencies and streamline travel programme components.

- **Few travel programmes use their online booking tool to promote sustainability.**
Fewer than half say their OBT shows carbon emissions in search results (44%) or displays lower emission flights higher in search results (10%), provides sustainability messaging (4%) or is configured to exclude less sustainable options from search results (2%). However, a decent number of travel managers are interested in configuring their OBT to do these things. These practices will likely become more common as sustainability concerns grow, OBTs design relevant key features and travel managers learn more about them.

- **There is widespread interest in chatbots. Seven in ten travel managers are interested in AI-enabled chat.**
These chatbots can answer traveller questions or help them make bookings. Despite interest, chatbots are largely absent from most travel programmes. Fewer than half say their TMC app includes a chatbot that can answer traveller questions (44%) or a chatbot that can help travellers make bookings (29%).

- **AI has the potential to dramatically transform how travel programmes operate.**
Travel managers are widely interested in using AI to enhance reporting (87%), data cleansing (82%), personalisation of search results (78%) and auditing of expense reports (62%).

- **Travel manager understanding of NDC is mixed, with many being largely uninitiated with the standard.**
One-third (30%) of travel managers say they know "some but have more to learn," while one in five say they know "virtually nothing" or only "a little" about NDC (20% each). While one in five (21%) report their programme offers NDC content through their TMC/OBT, one-third (34%) are unaware if their TMC/OBT offers NDC content – suggesting NDC is not top-of-mind among many travel managers.

TMCs and managed travel programmes

Travel managers have multiple responsibilities, ranging from creating travel policies, to conducting RFPs, to selecting travel-related technologies that support their programme. While the global pandemic halted most business travel in 2020 and 2021, travel managers are central to corporate travel programmes and perhaps now more than ever as recovery unfolds.

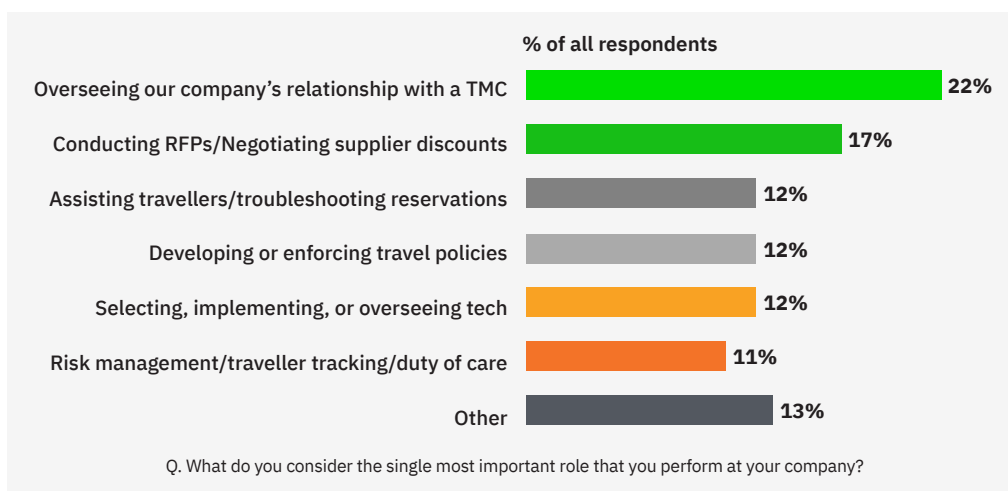When asked what the single most important role they perform at their company, responses included:

- One in five (22%) cite overseeing the company relationship with their TMC
- Followed by conducting RFPs and/or negotiating supplier discounts (17%)
- Assisting travellers/troubleshooting reservations (12%)
- Developing or enforcing travel policies (12%)
- Selecting/implementing/ overseeing technology (e.g., booking tools itinerary management apps, etc.) (12%)
- Risk management/traveller tracking/duty of care responsibilities (11%)

However, given the central role TMCs play in travel programmes, it's not entirely surprising that overseeing the TMC relationship is ranked the most important role performed for many travel managers. In addition, given that TMCs typically have technology in their package offerings, the selecting, implementing and overseeing of technology might not be as important a function for many travel managers.

Travel managers are central to corporate travel programmes and perhaps now more than ever as recovery unfolds.

Travel Managers single most important role at company

% of all respondents

Role	%
Overseeing our company's relationship with a TMC	22%
Conducting RFPs/Negotiating supplier discounts	17%
Assisting travellers/troubleshooting reservations	12%
Developing or enforcing travel policies	12%
Selecting, implementing, or overseeing tech	12%
Risk management/traveller tracking/duty of care	11%
Other	13%

Q. What do you consider the single most important role that you perform at your company?
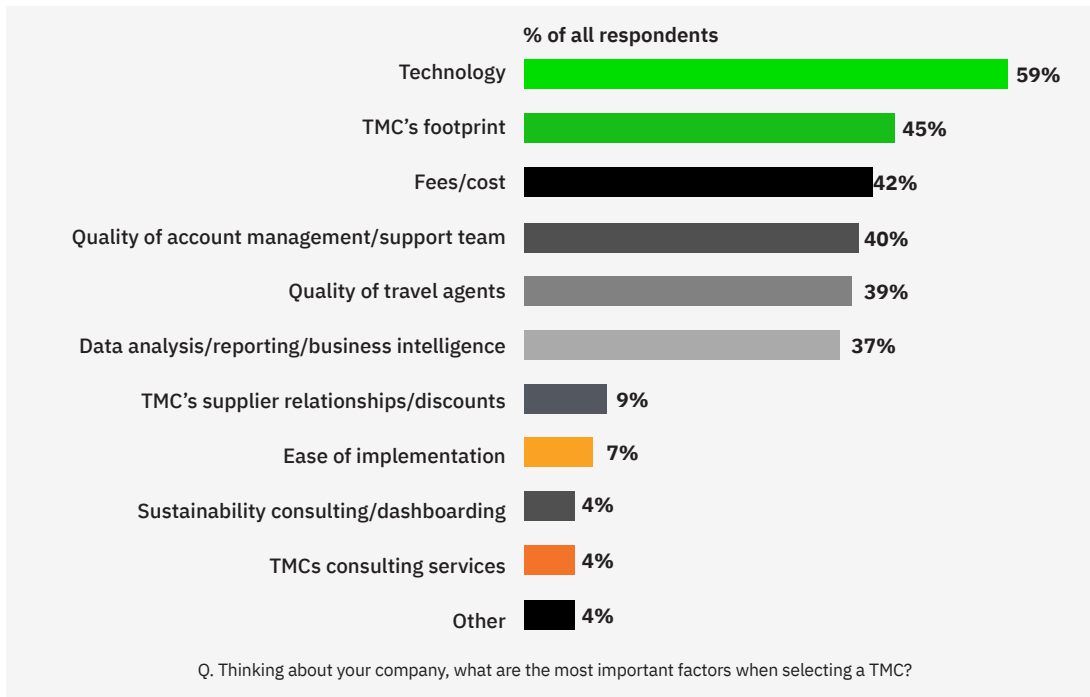
Knowing that managing the TMC relationship is critical for travel managers, what are the most important factors they look for when selecting a TMC? Technology tops the list, with six in ten (59%) citing it as the most important factor, followed by TMC global footprint (45%), fees/costs (42%), and quality of account management/support team (40%).

In fact, regardless of global region, technology is the most frequently cited factor travel managers consider when selecting a TMC. Other important factors include the quality of travel agents (39%) and data analysis reporting/business intelligence (37%) – an important function technology can provide.

Factors not perceived as being particularly important (regardless of region) when selecting a TMC include: TMC supplier relationships/discounts (9%), ease of implementation (7%), sustainability consulting (4%) or TMC consulting services (4%). These findings suggest travel managers do not perceive these services are necessarily part of a TMC's central role and are thus not rated as highly compared to other TMC decision factors.

Most important factors when selecting TMC

% of all respondents

Factor	%
Technology	59%
TMC's footprint	45%
Fees/cost	42%
Quality of account management/support team	40%
Quality of travel agents	39%
Data analysis/reporting/business intelligence	37%
TMC's supplier relationships/discounts	9%
Ease of implementation	7%
Sustainability consulting/dashboarding	4%
TMCs consulting services	4%
Other	4%

Q. Thinking about your company, what are the most important factors when selecting a TMC?

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As travel managers recognise the importance technology plays in their programme, their personal understanding of travel technology trends varies. Indeed, a majority feel they have a "great" (15%) or "pretty good" (52%) understanding of travel technology trends. However, a third rate their understanding as "average" (29%) or "poor" (4%) – demonstrating a need that could be improved with greater industry communication and education (i.e., what technology options are available, how they work, and their benefits). Interestingly, travel managers in the APAC region (46%) are more likely to rate their understanding of travel technology trends as being "average" compared to those based in North America (25%) and Europe (26%) who feel the same.

2 in 3 Travel Managers have strong understanding of travel tech trends

Travel Manager understanding of corporate travel tech trends

Great	Pretty good	Average	Poor	Very poor
15%	52%	29%	4%	0%

Q. Do you feel you have..?

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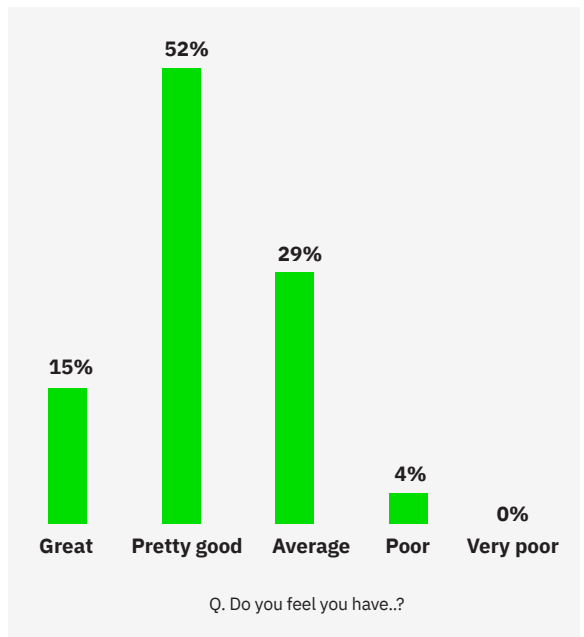
TMCs and the technology experience

TMCs offer a host of services to their clients including travel management, traveller assistance, consulting services, assistance with travel policy development, technology (often including an online booking tool, mobile app and data visualisation tool) and even employee leisure management. So central are TMCs to corporate travel programmes, that travel managers have a keen sense of what they need from a TMC. In addition, travel managers have a strong understanding of TMC primary strengths and weaknesses, which in turn can impact their selection of suppliers.
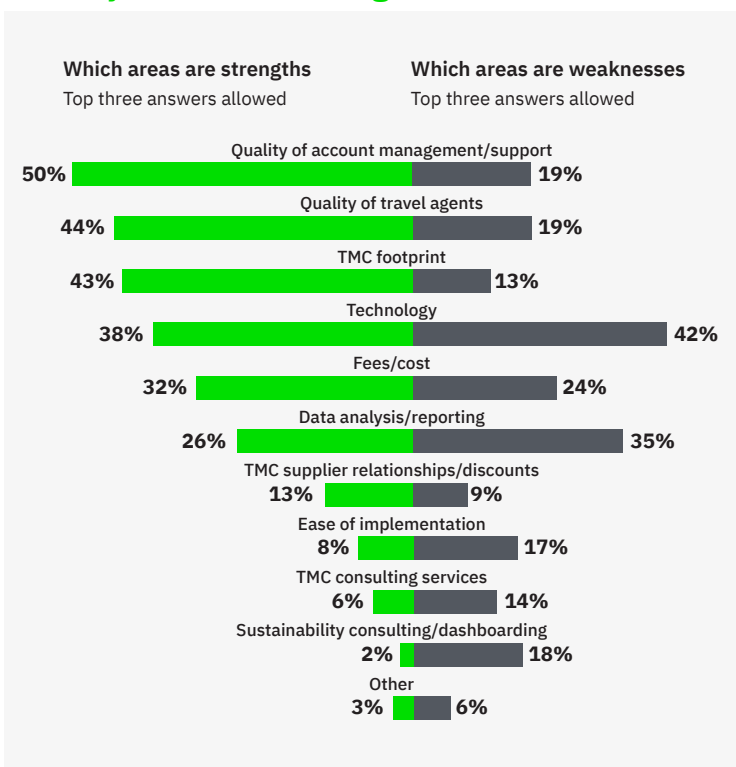
When asked to cite the top three strengths of their TMC, customer service features and TMC global reach were scored the highest. Specifically, travel managers ranked quality of account management / support team (50%), travel agent quality (44%), and TMC global footprint (i.e., presence in regions where their company operates; 43%) as the most frequently cited TMC strengths. Not far behind the list of top TMC strengths include technology

(38%), fees / costs (32%) and data analysis / reporting / business intelligence (26%). As travel managers cited overseeing the relationship with their TMC as their most important role, it's not entirely surprising TMC support and global reach are perceived as top strengths, as these are attributes travel managers are likely to rely upon when managing their vendors.

> " I am fairly comfortable [managing technology], however take time to try and keep up with changes and updates as travel tech is a fast-moving world. "
>
> TRAVEL BUYER, UNITED KINGDOM

Primary TMC Used: Strengths and Pain Points

Which areas are strengths
Top three answers allowed

Which areas are weaknesses
Top three answers allowed

Quality of account management/support
50% | 19%

Quality of travel agents
44% | 19%

TMC footprint
43% | 13%

Technology
38% | 42%

Fees/cost
32% | 24%

Data analysis/reporting
26% | 35%

TMC supplier relationships/discounts
13% | 9%

Ease of implementation
8% | 17%

TMC consulting services
6% | 14%

Sustainability consulting/dashboarding
2% | 18%

Other
3% | 6%

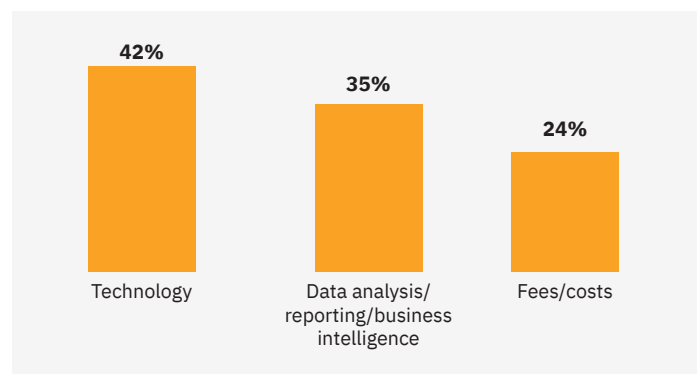GBTA FCM

Conversely, when asked to rank key TMC pain points, issues surrounding technology and costs are ranked higher than the service-related concerns. And while technology is the most important factor travel managers consider when selecting a TMC, it is also the most commonly mentioned pain point.

In fact, four in ten travel managers cite technology (42%) as the top TMC pain point, followed by data analysis/reporting/business intelligence (35%), and fees/costs (24%). It is noteworthy the top two cited pain points (technology and data analysis/reporting/BI) are closely related suggesting technology, including the data analytics it generates, is challenging for many travel managers. In fact, regardless of global region technology, data analysis/reporting/BI and fees/costs are the top three pain points for travel managers suggesting TMCs who can best address these concerns will likely be successful in expanding their client roster and increase market share.

Top TMC strengths

	50%	44%	43%
	Quality of account management/ support team	Quality of travel agents	TMC's footprint

Top TMC pain points
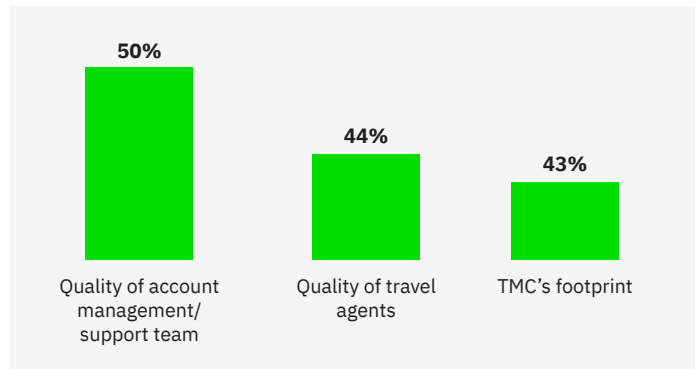
	42%	35%	24%
	Technology	Data analysis/ reporting/business intelligence	Fees/costs

Technology strategy and travel manager expectations

Given the importance of technology, the question of how it enters the programme and travel managers expectations from it are important to understand the needs and opportunities for both TMC providers and the industry at large. The pandemic drove a lot of consolidation and buyouts of tech-focused travel companies.[1] Some examples include 30 Seconds to Fly, WhereTo, Shep, Pana, TravelBank, Lola, Yapta, and Rocketrip.[2] Because of this, many companies are more reliant on TMCs for travel technology, as it can be more difficult to obtain technology directly from startups and other providers.

[1] https://www.businesstravelnews.com/Procurement/Who-Bought-Whom-in-2020
[2] https://www.businesstravelnews.com/Procurement/Who-Bought-Whom-in-2021

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Many travel managers (46%) say they obtain most of their travel technology from their TMC, but technology enters programmes from external sources as well including direct agreements with other partners such as OBTs, risk management firms, start-ups and/or apps.
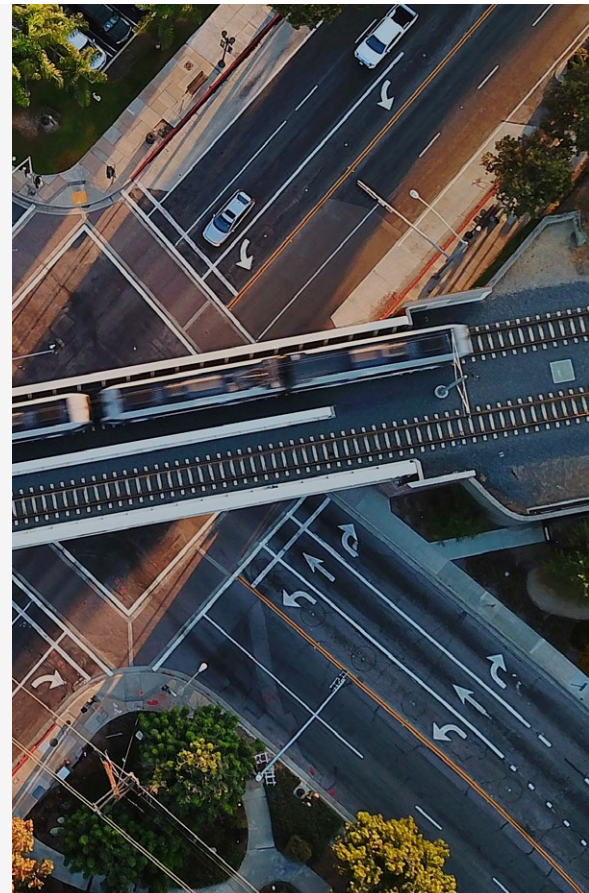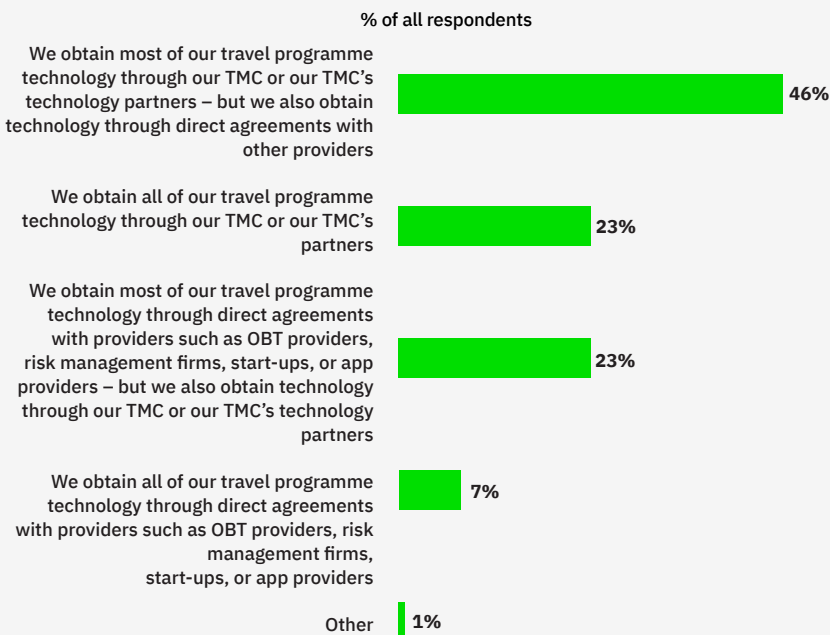
- One in four travel managers report they obtain all (23%) or at least some (23%) of their travel programme technology from their TMC.

- Travel managers based in the APAC region (39%) are more likely to obtain all technology through their TMC and/or TMC partners compared to those based in North America (23%) and Europe (14%).

- Less than one in ten (7%) programmes overall obtain all their technology through direct agreements with providers including OBT providers, risk management firms, start-ups or app providers.

With one-quarter of travel managers reporting their programme obtains most technology from direct provider agreements, many likely associate travel technologies with OBTs. Thus, they might be unaware of other options and technology providers outside OBTs.

> As a new travel manager, I am still getting a feel for the tools we utilise. I rely heavily on my team, and they have a high comfort level with the tools. Our biggest challenge is integration of all systems owned by the TMC and our organisation and getting them to function reliably and update regularly.

TRAVEL BUYER, UNITED STATES

What best describes your company's technology strategy?

% of all respondents

- We obtain most of our travel programme technology through our TMC or our TMC's technology partners – but we also obtain technology through direct agreements with other providers: **46%**
- We obtain all of our travel programme technology through our TMC or our TMC's partners: **23%**
- We obtain most of our travel programme technology through direct agreements with providers such as OBT providers, risk management firms, start-ups, or app providers – but we also obtain technology through our TMC or our TMC's technology partners: **23%**
- We obtain all of our travel programme technology through direct agreements with providers such as OBT providers, risk management firms, start-ups, or app providers: **7%**
- Other: **1%**

> ## I am comfortable managing the technology piece of the travel programme, but I am not a tech person and need programmes to handle updates, design, etc.
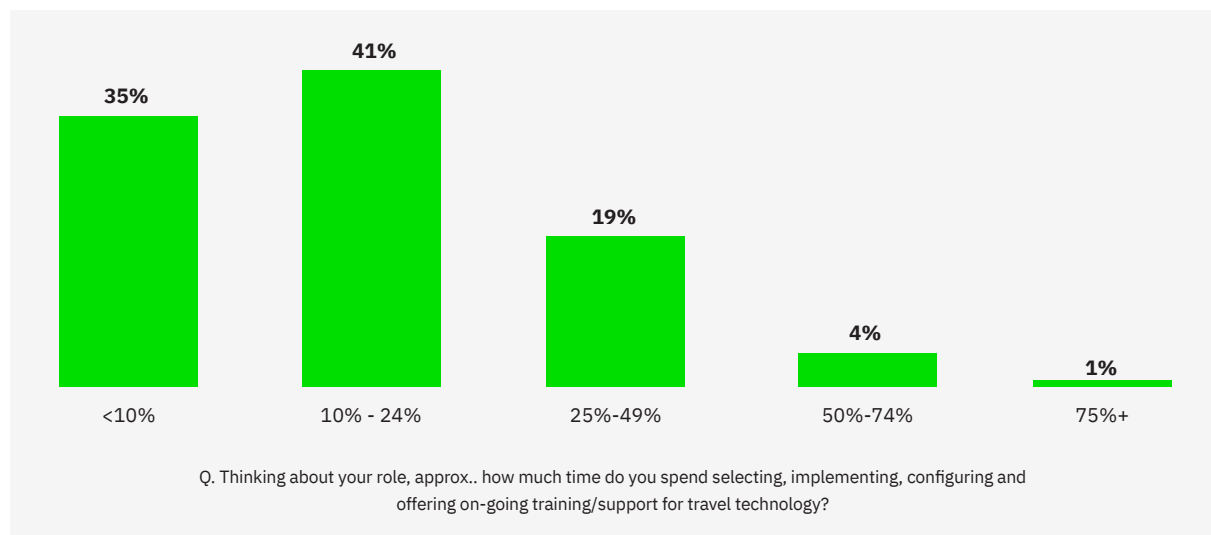
TRAVEL BUYER, UNITED STATES

Central to travel manager expectations of TMCs is offering a consistent technology experience across every region or market where the company operates. On average, nine in ten (94%) say a consistent experience is either "very important" or "important" – with travel managers based in Europe (97%) and North America (96%) being slightly more likely than those based in APAC (84%) to rate a consistent experience as important.

Yet despite the importance of a consistent experience, the amount of time spent managing, implementing, overseeing or using travel programme technology vary. One-third (35%) spend less than 10% of their time doing so, while two in five (41%) spend anywhere between 10% and 25% of their worktime managing technology. Finally, one in five (19%) travel managers report they spend between 25% and 50% of their time managing technology.

The wide range of time managers spend handling travel technology suggests many might find it challenging, and/or their company might use multiple technology platforms which require more time to manage. Many travel managers, particularly those who spend more than 25% of their time managing technology, might be more open to streamlining travel technology to help reduce the amount of time they spend managing it.

Time spent managing technology

Category	Percentage
<10%	35%
10% - 24%	41%
25%-49%	19%
50%-74%	4%
75%+	1%

Q. Thinking about your role, approx.. how much time do you spend selecting, implementing, configuring and offering on-going training/support for travel technology?
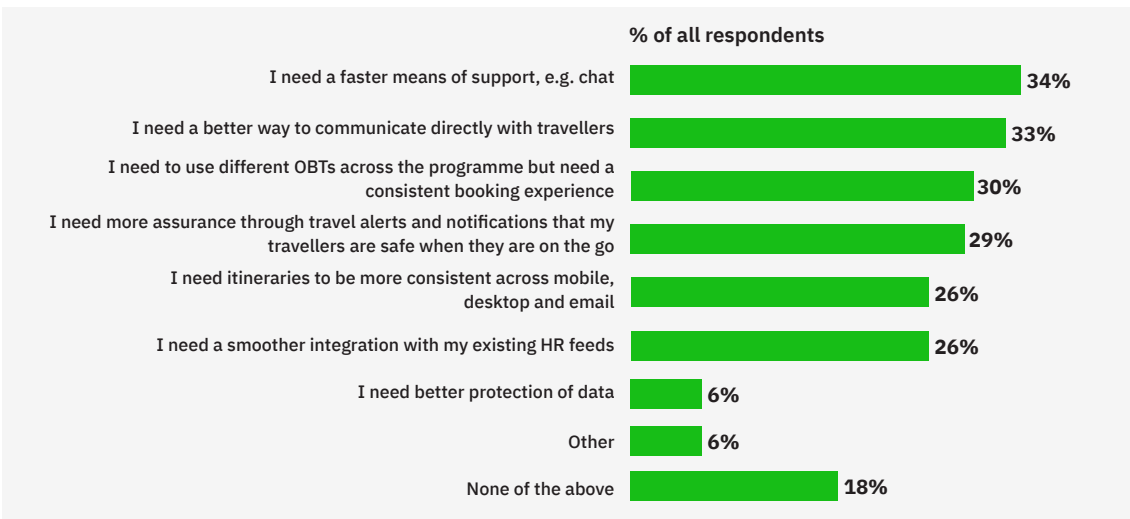
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Other travel manager needs provide insights into why many spend a larger percentage of their time managing technology. When asked to name top needs with their primary TMC technology offerings, travel managers report they have several needs including faster support via chat functionality (34%), better ways to communicate with their travellers (33%), consistent booking experiences across multiple OBTs (30%), assurances of traveller safety (29%), consistent itineraries regardless of tech device used (26%) and smoother integration with HR feeds (26%).

Interestingly, few (6%) cite they need better data protection, indicating technology providers and internal IT departments provide strong protection via security systems and firewalls. Given the variety of TMC technology needs cited, travel managers value solutions that give them back time.
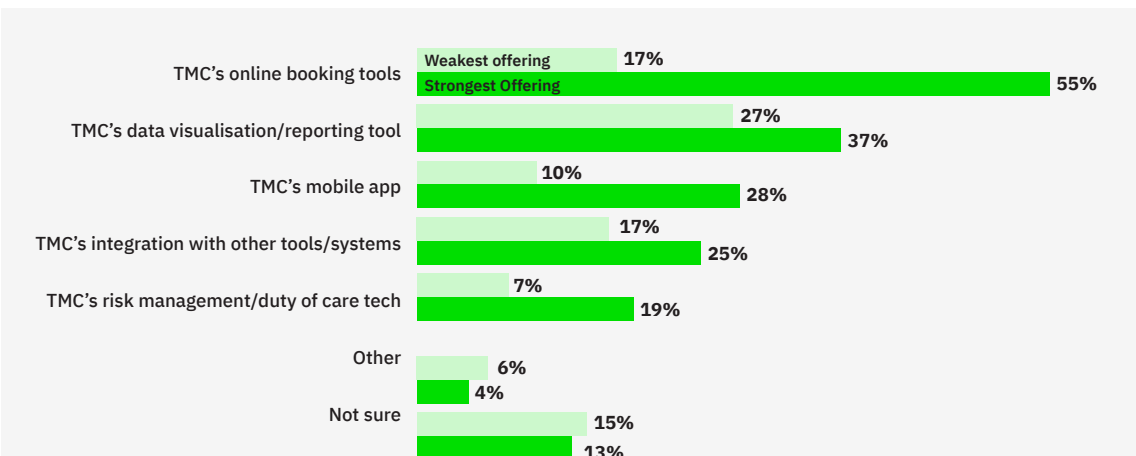
Travel Manager Needs From Primary TMC Tech

% of all respondents

Need	%
I need a faster means of support, e.g. chat	34%
I need a better way to communicate directly with travellers	33%
I need to use different OBTs across the programme but need a consistent booking experience	30%
I need more assurance through travel alerts and notifications that my travellers are safe when they are on the go	29%
I need itineraries to be more consistent across mobile, desktop and email	26%
I need a smoother integration with my existing HR feeds	26%
I need better protection of data	6%
Other	6%
None of the above	18%

When travel managers assess the strongest core TMC technology offerings, over half (55%) cite the OBT, followed by the data visualisation/reporting tool (37%) and TMC mobile app (28%). Other features perceived as being strong include TMC integration with other corporate tools and systems (25%) and risk management/duty of care technology (19%).

Strongest and Weakest Core TMC Tech Offerings

Offering	Weakest offering	Strongest Offering
TMC's online booking tools	17%	55%
TMC's data visualisation/reporting tool	27%	37%
TMC's mobile app	10%	28%
TMC's integration with other tools/systems	17%	25%
TMC's risk management/duty of care tech	7%	19%
Other	6%	4%
Not sure	15%	13%

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As over half feel technology provided by their TMC as being the strongest OBT offering, we can assume many travel managers might associate travel technology as largely being the OBT itself. But there are solutions beyond OBTs that can also help streamline travel programme technology and create efficiencies. In a similar vein, travel managers cite TMC data visualisation and reporting tools as a strong offering (37%), but one in four (27%) also cite it as a weakness. Given the industry shift to data analytics and visualisations, there is an increased need for digital options.

Travel technology adoption

Looking specifically at the technology tools and platforms used by travel programmes, most report using an OBT (95%), reporting/analytics dashboarding technology (73%), and a mobile TMC app (63%).

Given the importance of dashboarding/reporting, as well as the wide proliferation of mobile apps that can simplify tasks for users, it's not entirely surprising a majority of managers report their programme have these tools/platforms. However, some newer technology solutions are less common including hotel (35%) and air re-shopping (31%) solutions, single use virtual payments (22%) and off-channel booking capture tools (19%). Many travel managers might be uninitiated with newer solutions that can automatically re-book or permit crossover interaction with other technologies. Yet there are providers and TMCs that can incorporate newer solutions and demonstrate those benefits, from saving time and money to reporting options.
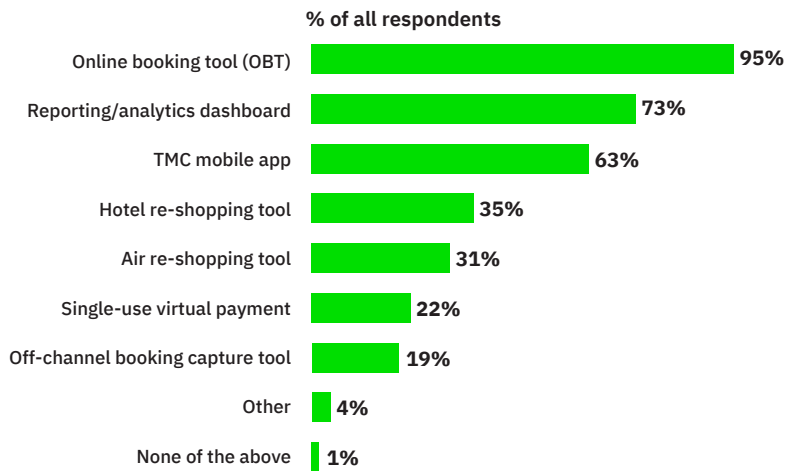
When asked to assess the likelihood of incorporating new technologies in their programmes, two-thirds of managers who do not currently have an OBT (67%) and/or analytics dashboarding technology say they are likely to do so in the next year. However, roughly one-third of travel managers whose programmes do not currently include a TMC mobile app (38%), air (37%) and hotel re-shopping (35%) tools, single-use virtual payments (32%) and off-channel booking tools (32%) expect to incorporate these solutions within the next year.

> **Technology implementation has been, and will always be, difficult given the many security and IT issues which come about when implementing an external system onto a company network. I would add it is just as difficult for the supplier.**
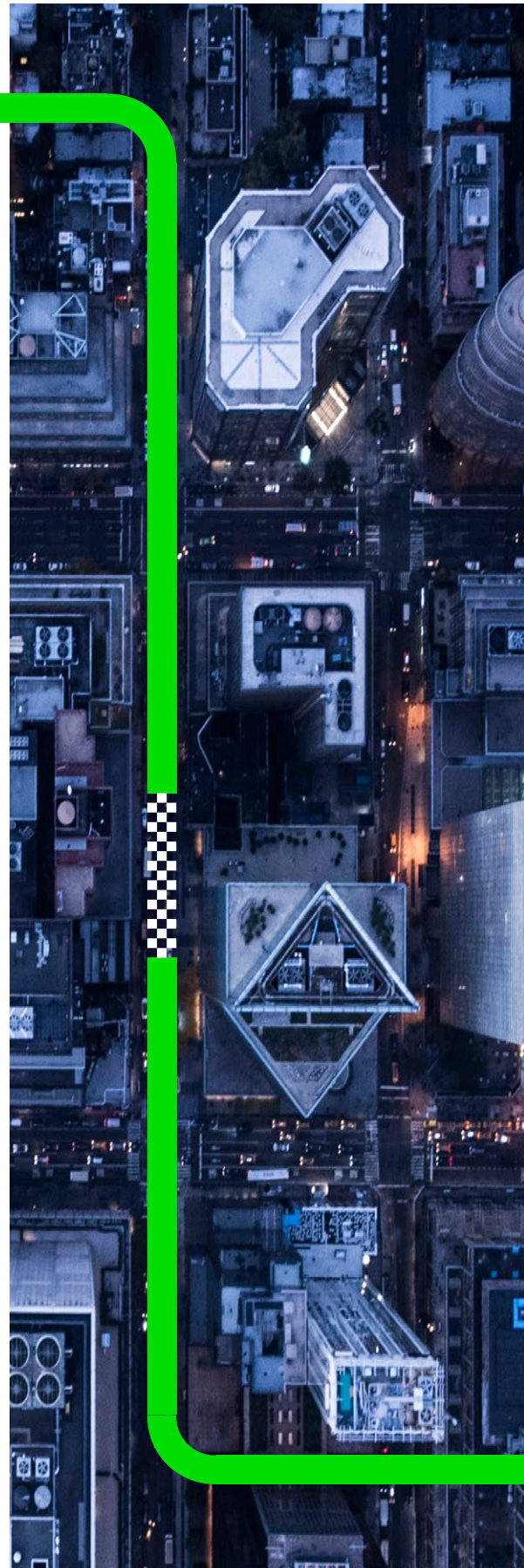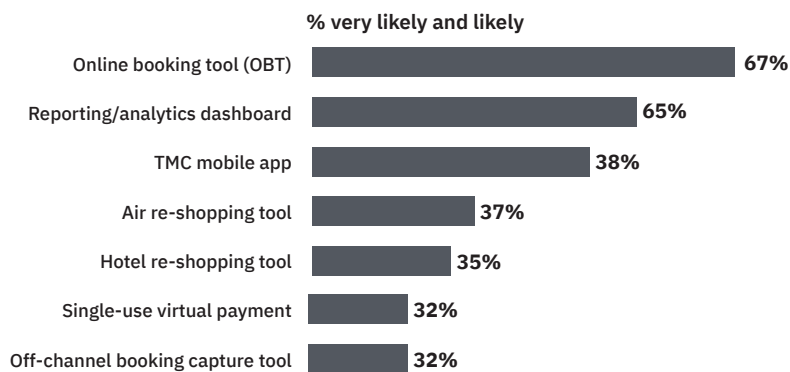>
> TRAVEL BUYER, UNITED STATES

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Tools and Platforms Currently Used

% of all respondents

Online booking tool (OBT)	95%
Reporting/analytics dashboard	73%
TMC mobile app	63%
Hotel re-shopping tool	35%
Air re-shopping tool	31%
Single-use virtual payment	22%
Off-channel booking capture tool	19%
Other	4%
None of the above	1%

The lack of awareness surrounding these technologies, as well as how they can benefit travel programmes, might explain the relatively lower adoption expectations among travel managers. It also presents an opportunity for technology providers to introduce these solutions to travel managers and communicate benefits.

Likelihood Programme Will Begin Using Within Next Year

% very likely and likely

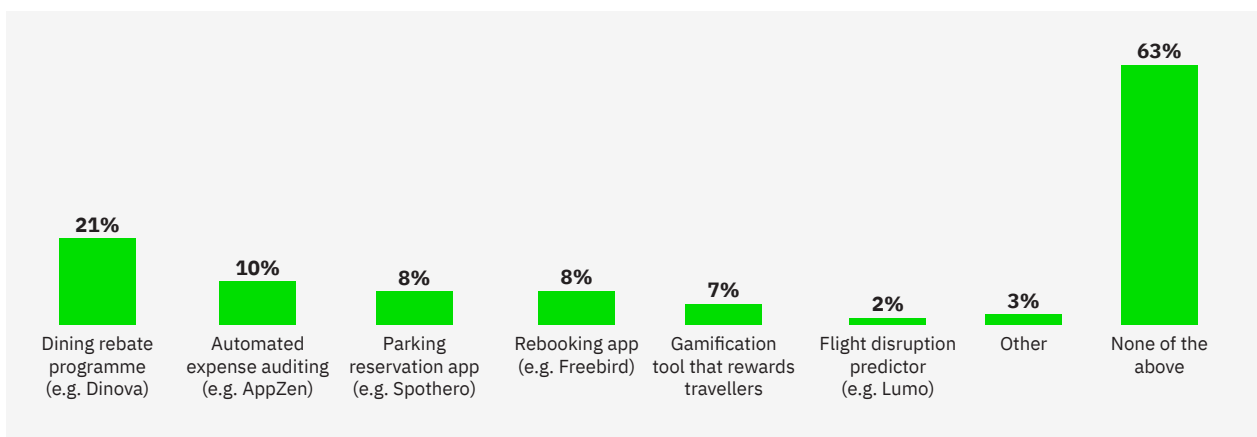|	
Online booking tool (OBT)	67%
Reporting/analytics dashboard	65%
TMC mobile app	38%
Air re-shopping tool	37%
Hotel re-shopping tool	35%
Single-use virtual payment	32%
Off-channel booking capture tool	32%

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Travel technology: a closer look

There are a number of business travel start-ups that offer technology. However, only some travel programmes currently use these. These include:

- **Dining rebate programmes:** Dinova offers a dining rewards programme tied to corporate credit cards. When an employee uses a corporate credit card at certain partner restaurants and chains, the employee can earn rewards, or their company can earn rebates. One in five travel programmes (21%) currently participate in one of these programmes.

- **Parking reservation apps**: Some platforms (e.g., Spothero) allow travellers to pre-reserve parking near their destination. In some cases, travel programmes can have a business account or formal relationship with one of these parking technology providers. However, only 8% of travel managers say they currently offer this to their employees.

- **Gamification:** Gamification platforms (e.g., Rocketrip) give companies the ability to reward travellers for saving money. For instance, if a traveller books a cheaper flight than their company's policy allows (e.g., flying economy class instead of business class), the platform might reward them with points that they can redeem for cash or gift cards. Seven percent of travel programmes currently use one of these platforms.

- **Jet lag apps:** Jet lag apps (e.g., Timeshifter) help international jetsetters adjust to new time zones. These apps recommend when to sleep, avoid caffeine, and get exposure to bright light. Travel programmes can partner with one of these companies to offer the app to all of their company's employees. However, none of the travel programmes surveyed currently do so.

Technology Offer to Employees

Dining rebate programme (e.g. Dinova)	21%
Automated expense auditing (e.g. AppZen)	10%
Parking reservation app (e.g. Spothero)	8%
Rebooking app (e.g. Freebird)	8%
Gamification tool that rewards travellers	7%
Flight disruption predictor (e.g. Lumo)	2%
Other	3%
None of the above	63%

Dashboarding

Looking more closely at current travel technology used by programmes can provide insights into both travel manager awareness, as well as gaps which can identify opportunities for the industry. For decades, TMCs have provided clients with reports that help them understand travel spending, policy compliance, and opportunities for improvement.

Recently, TMCs and other industry players have shifted from providing static reports to online interactive dashboards. However, this transition is still largely a work in progress.
While two-thirds of travel programmes (68%), use a reporting/analytics dashboard:
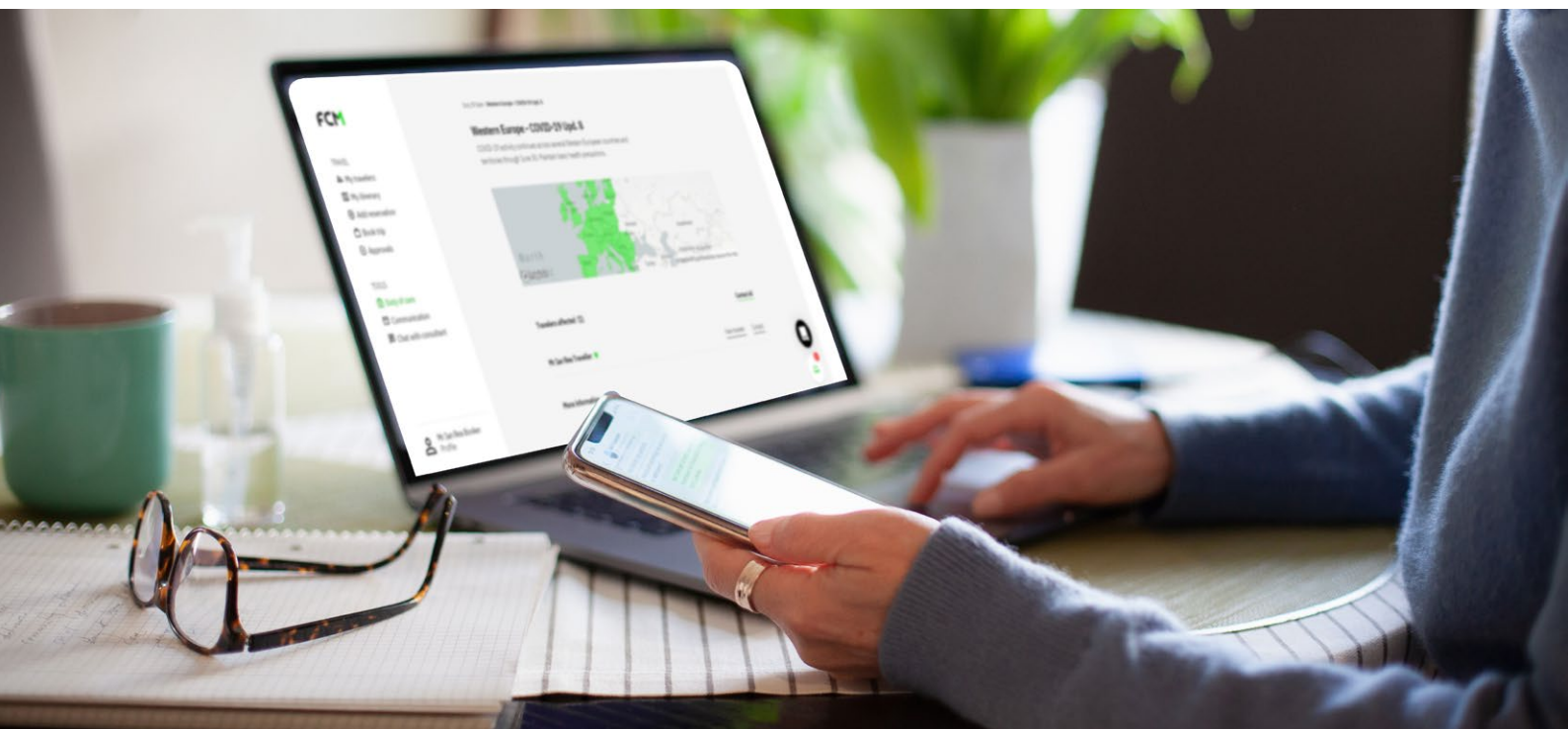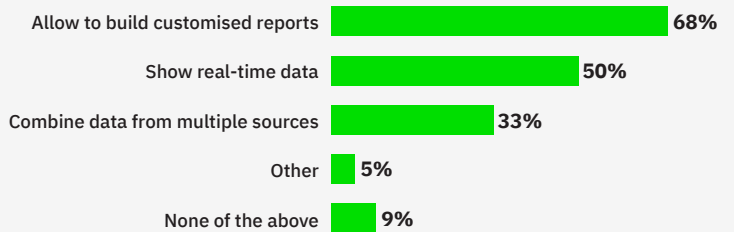
- Only two-thirds say their tool allows them to build customised reports
- Half (50%) say it shows real-time data
- Only one-third (33%) say it allows them to combine data from multiple sources

This could explain why a decent number of respondents (35%), identify data analysis/reporting/business intelligence as a pain point of their primary TMC. This trend is consistent across all regions surveyed as well, suggesting the opportunity to promote additional solutions would likely be well received.

> " I think using a programme to manage the travel across the organisation allows us better control on expenses on one hand, but also provides us a lot of information in real time which now is very important. "
>
> TRAVEL BUYER, ITALY

Features of Reporting/Analysis Dashboard

Feature	Percentage
Allow to build customised reports	68%
Show real-time data	50%
Combine data from multiple sources	33%
Other	5%
None of the above	9%

TMC mobile apps

Other opportunities exist to enhance technical features, particularly with TMC mobile apps. TMC apps are making a slow transition from pure itinerary management apps to more robust tools that people can use to self-manage travel. Two-thirds (63%) of travel managers report their platform uses a TMC mobile app.

However, the app features provided are often more informative and transactional in nature, and less interactive and customisable. For example:
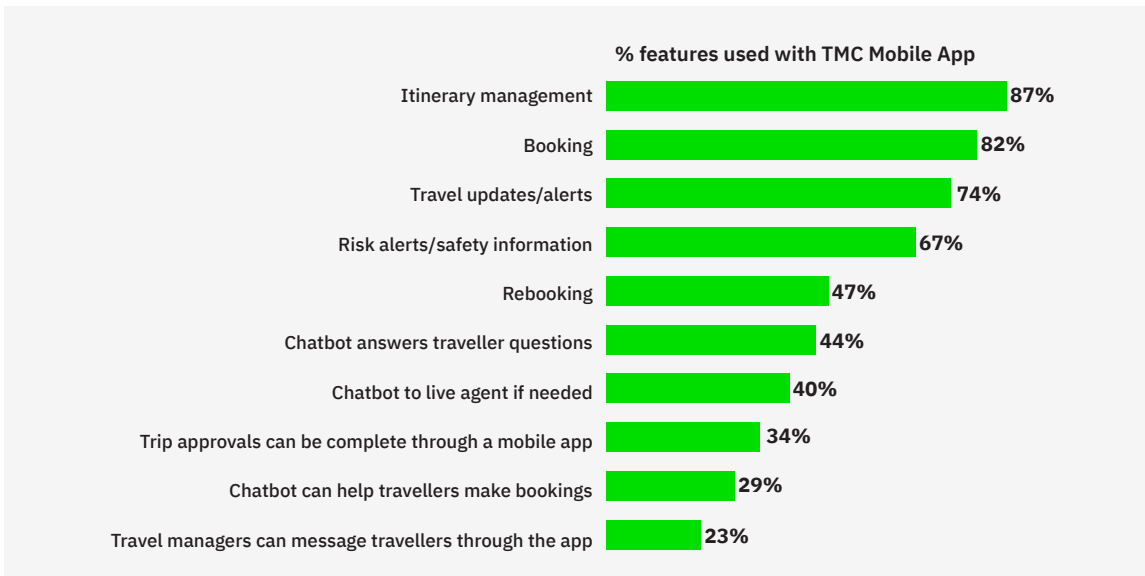
- A majority of TMC mobile apps provide itinerary management (87%)
- Travel booking (82%)
- Travel updates/alerts (74%)
- Risk/safety alert information (67%)

Less common TMC app features include:

- Rebooking capabilities (47%)
- Chatbot abilities to answer traveller questions (44%)
- Ability to connect to a live agent if needed (40%)
- Permit trip approvals via the app (34%)

Additional (rarely offered features) include chatbots that help travellers make reservations (29%) and the ability to message travellers directly through the app (23%). Given the relative widespread adoption of TMC mobile apps in travel programmes, features that allow interactive communications with travellers (either with a live agent or a chatbot) will likely be well received.

Features Included with TMC Mobile App

% features used with TMC Mobile App

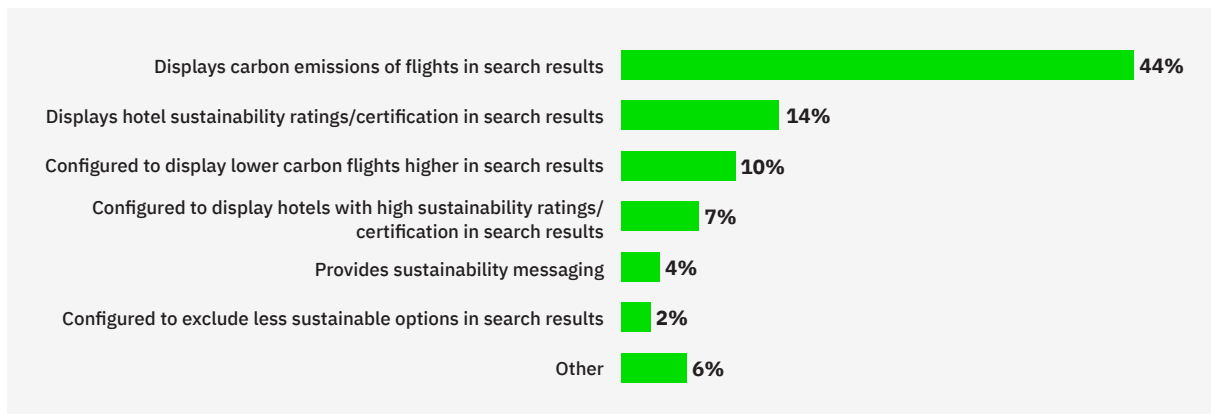| Feature	%
Itinerary management	87%
Booking	82%
Travel updates/alerts	74%
Risk alerts/safety information	67%
Rebooking	47%
Chatbot answers traveller questions	44%
Chatbot to live agent if needed	40%
Trip approvals can be complete through a mobile app	34%
Chatbot can help travellers make bookings	29%
Travel managers can message travellers through the app	23%

Sustainability

Given increasing industry concerns about sustainability and carbon reduction, opportunities for OBTs to help promote sustainability would likely be well received by travel managers and travellers alike. Few OBTs provide sustainability information, despite growing concerns surrounding environmental issues and carbon reduction. In fact, fewer OBTs provide carbon emission results in search results (44%).

Other sustainability-related information provided by the OBT is less common, including hotel sustainability ratings (14%), lower carbon flights prioritisation (10%) and hotels with higher sustainability ratings (7%) in search results. Given the relatively few sustainability-related information features incorporated in many OBTs, additional opportunities exist for OBTs and TMCs to incorporate sustainability metrics and will be well received by travel managers as they seek to include sustainability in their travel programmes.
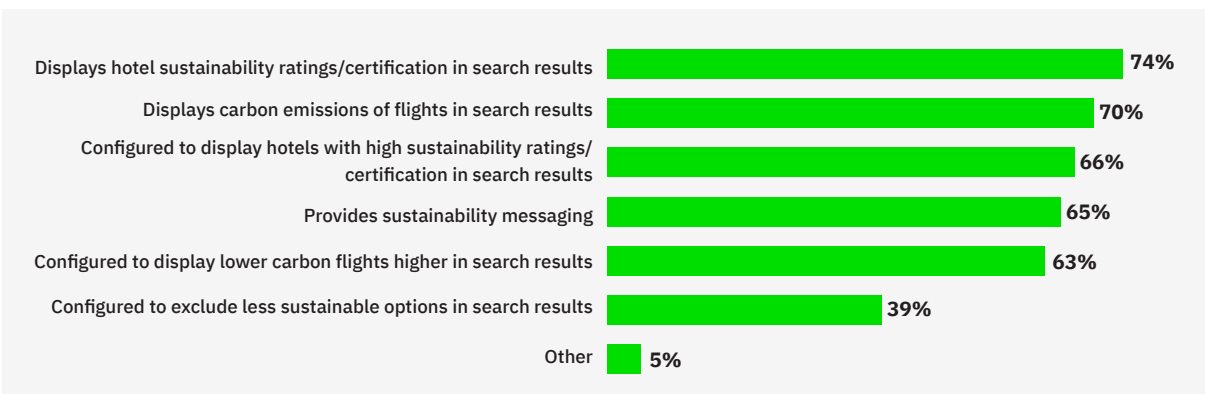

Sustainability Features Used in Current OBT

Displays carbon emissions of flights in search results	44%
Displays hotel sustainability ratings/certification in search results	14%
Configured to display lower carbon flights higher in search results	10%
Configured to display hotels with high sustainability ratings/certification in search results	7%
Provides sustainability messaging	4%
Configured to exclude less sustainable options in search results	2%
Other	6%

Despite the relatively low incorporation of sustainability measuring features in OBTs, interest in promoting sustainable business travel is strong. In fact, travel managers express strong interest in OBT features that provide sustainability information for their travellers, including search results that provide hotel sustainability certifications (74%), carbon emission information (70%), prominent placement of hotel sustainability ratings (66%), sustainability messaging (65%), and lower flight CO2 information when searching for flights (63%). However, fewer travel managers (39%), are interested in OBT features that exclude less sustainable options from search results, suggesting many managers might still be assessing how they want to incorporate sustainable practices into their travel programme and as such, might not want travel options excluded.

Interest in OBT Features

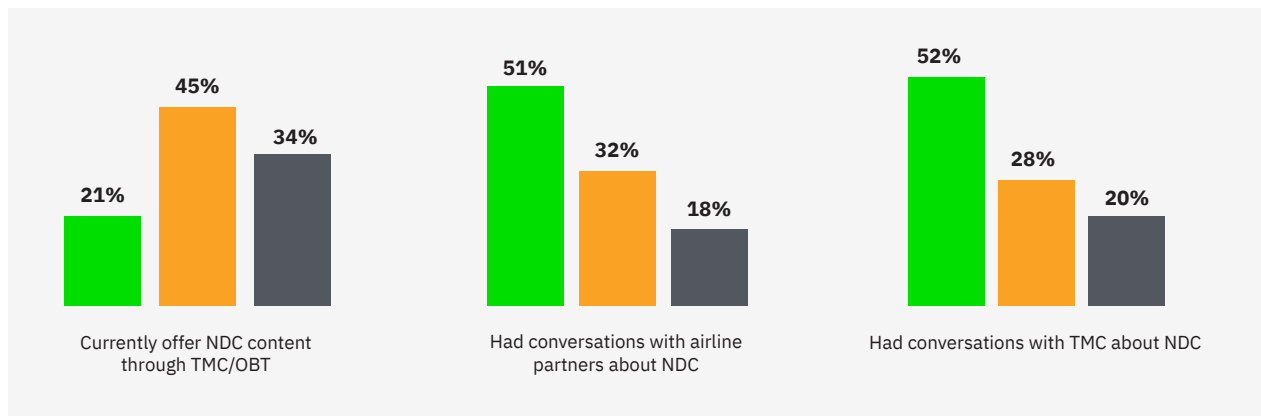|	
Displays hotel sustainability ratings/certification in search results	74%
Displays carbon emissions of flights in search results	70%
Configured to display hotels with high sustainability ratings/certification in search results	66%
Provides sustainability messaging	65%
Configured to display lower carbon flights higher in search results	63%
Configured to exclude less sustainable options in search results	39%
Other	5%

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NDC

NDC (New Distribution Capability) is a travel industry-supported programme introduced by IATA for the development and market adoption of an XML-based data transmission standard (i.e., NDC standard). The standard seeks to enhance the capability of communications between airlines and travel agents and is open to any third party, intermediary, IT provider or non-IATA member, to implement and use[3].

First introduced in 2012, it has yet to reach widespread adoption among many travel programmes, and many travel managers are largely uninitiated to the standard. In fact, only one in three travel managers describe themselves as being "pretty knowledgeable" (27%) or "know everything about it" (3%). An additional third (30%) say they know "some but have more to learn" while one in five travel managers report they know "virtually nothing" or only "a little" about NDC (20% each).

These findings are not entirely surprising, as only one in five (21%) travel managers report their programme offers NDC content through their TMC/OBT. In fact, one-third (34%) say they are unaware if their TMC/OBT offers NDC content, so NDC is not top of mind among many travel managers. However, half report they have had conversations with airline partners (51%) and their TMC (52%) about NDC, which can help raise awareness and potential adoption into the travel programme. It is noteworthy that European travel managers are more likely than their North American colleagues to use NDC, as well as have conversations with their airline partners and TMC.

[3] https://www.iata.org/en/training/pages/ndc/

NDC in Travel Programmes

Currently offer NDC content through TMC/OBT: 21%, 45%, 34%

Had conversations with airline partners about NDC: 51%, 32%, 18%

Had conversations with TMC about NDC: 52%, 28%, 20%

Artificial intelligence (AI)

Artificial intelligence (AI) is the simulation of human intelligence processes by machines, especially computer systems. Specific applications of AI include expert systems, natural language processing, speech recognition, and machine vision. AI applications can include advanced web search engines (e.g., Google), recommendation systems (used by YouTube, Amazon and Netflix), understanding human speech (such as Siri and Alexa), self-driving cars (e.g., Tesla), automated decision-making, and competing at the highest level in strategic game systems (such as chess and Go).

In the travel industry, AI incorporates chatbots that can help with bookings, answer questions, data cleansing, expense report auditing and reporting to name a few. Many travel managers might not be familiar with AI specifically, however, they are largely interested in AI innovations that can assist the travel programme. In fact, a majority of travel managers (regardless of region) are interested in AI business travel innovations that assist with:

• Real-time reporting (87%)

• Data cleansing (82%)

• Personalisation of search results (78%)

• Chatbots (69%)

• Auditing of expense reports (62%)

Clearly, travel managers are interested in technology features that help streamline the programme and create efficiencies.

Interest in AI-Related Business Travel Innovations

% very interested + interested

| Innovation	%
Reporting: TMC harnesses AI to generate custom reports in real time	87%
Data cleansing: AI helps merge data from multiple sources, detecting and removing duplicates	82%
Personalisation: TMC/OBT offers personalised search results based on traveller preference and company policy	78%
Chat: Chatbot uses AI to answer traveller questions and make bookings	69%
Auditing: AI enables automation of expense reports	65%

Summary

The rapid pace of travel technology innovation continues to present tremendous opportunities for travel managers and managed travel programmes alike. Given that technology offerings are one of the most (if not the most) important factor when travel managers select a TMC, it is critical TMC suppliers not only offer a comprehensive roster of technology offerings but can communicate the benefits of newer technology features to oftentimes uninitiated travel managers.

Indeed, as most travel programmes obtain their travel technology from their TMC provider, it is imperative providers have a solid understanding of not only what technology is available, but why it would help travel managers solve challenges that impact the programme. As many travel managers likely associate travel technology almost exclusively with OBTs, there are learning opportunities for travel buyers to explore more options from TMCs.
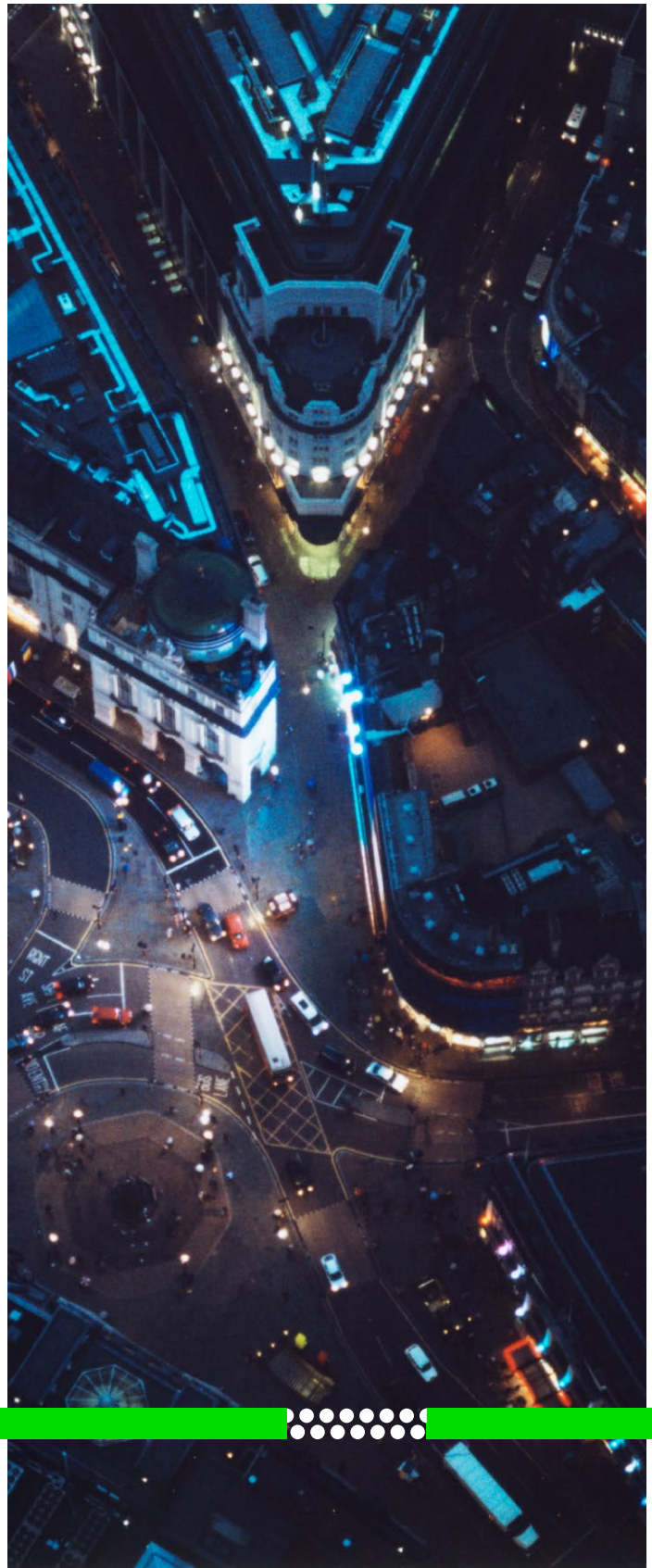
Methodology

- Data collected from February 14 – March 21, 2022
- An email invitation was sent to 2,818 travel managers. FCM promoted the survey to their APAC contacts as well.
- 309 travel managers based in the US, Canada, Europe and APAC responded to at least one question.
- Among them, 194 travel managers who qualified for the study completed the entire survey for a response rate of approximately 7%.
- Respondents qualified if:
  - o They are based in the United States, Canada, Europe or APAC region.
  - o They are involved in managing or procuring travel on behalf of their company.
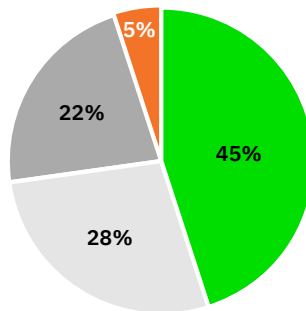 - o Their company uses a TMC for any product or service.
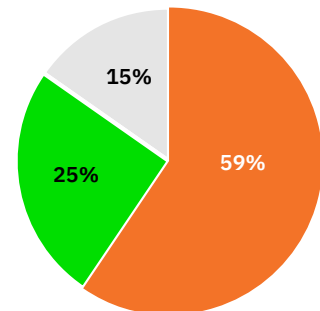

Respondent Profile

Travel policy

46% Mandated
54% Guidelines

Mandated   Guidelines

Travel spend

5%
22%
45%
28%
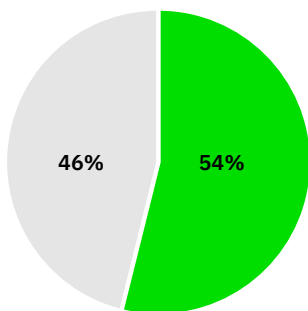
Less than $10 million
$10 million to less than $30 million
$30 million or more
Not sure

Company reach

15%
25%
59%

National   Multi-national   Global
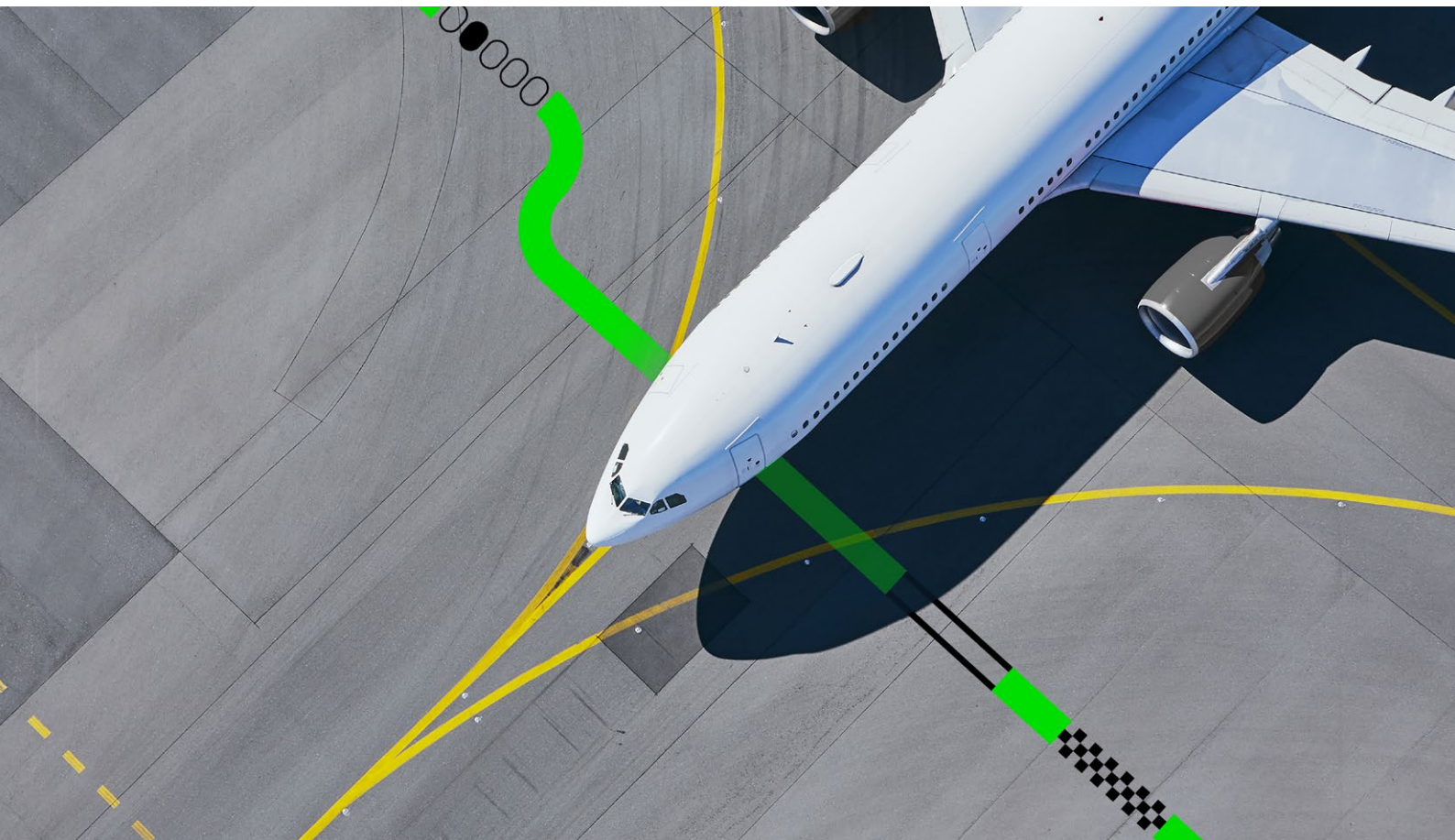
About GBTA

The Global Business Travel Association (GBTA) is the world's premier business travel and meetings trade organisation headquartered in the Washington, D.C. area with operations on six continents. GBTA's members manage more than $345 billion of global business travel and meetings expenditures annually. GBTA delivers world-class education, events, research, advocacy, and media to a growing global network of more than 28,000 travel professionals and 125,000 active contacts. To learn how business travel drives lasting business growth, visit **www.gbta.org.**

About FCM

FCM is one of the largest travel management companies in the world, and the flagship global business travel division of Flight Centre Travel Group. Operating in over 97 countries across the world, FCM's team exists on a truly global scale. Dedicated to supporting each other and staying connected, so that travellers know they're in good hands, no matter where they are in the world.

Globally connected, flexible, and a little unconventional — FCM make sure that wherever travellers are going, they can do it their way. Whether customers have regular international travel needs, take single trips at the last-minute, or want to consolidate their business travel services and costs across multiple countries — FCM's global network has the experience, reach and negotiating strength needed in a travel partner.

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