

COVID-19 travel buyer experience and outlook #2

About the survey



The goal: With this survey we aimed to explore the **current state of travel programs** impacted by COVID-19 and better understand **travel buyers' needs** as business travel starts emerging from the pandemic.



Methodology: The results are based on an online survey of **100 travel managers** conducted from June 2-12, 2020.



This is the **second travel buyer study** related to COVID-19. You can find the first one [here](#).

Respondent profile



60% of travel managers have **global** responsibilities and 33% manage **regional** travel programs.



60% are based in **North America** (the U.S. and Canada) and 30% are in **EMEA**, including the U.K.



Top three industries: **Pharmaceutical** (20%), **Manufacturing** (16%) and **Financial services** (16%).

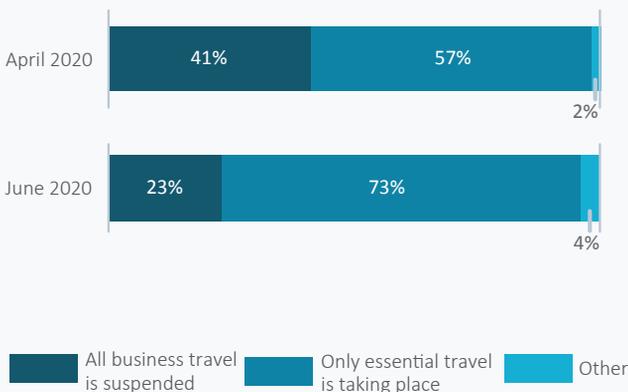


71% work for **large companies** with more than 10,000 employees.

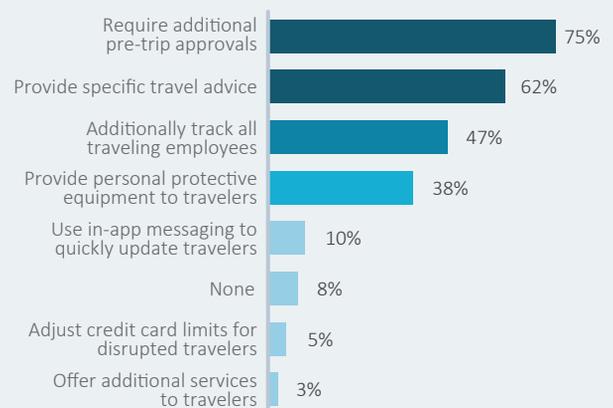


52% have annual **travel spend of US\$50 million** and above.

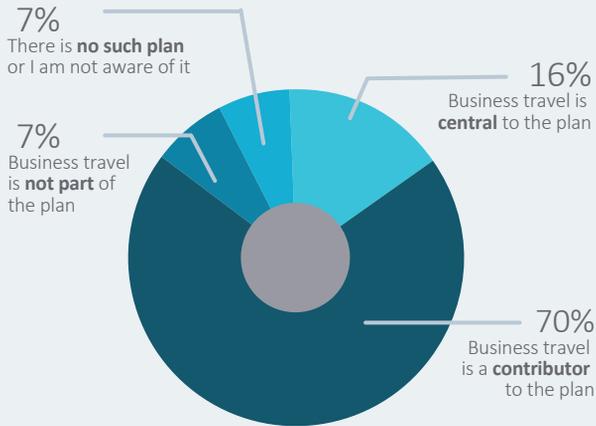
COVID-19 had a strong **negative impact** on business travel but this is **gradually weakening**. In June 2020, three-quarters of respondents reported essential trips taking place; 17 points higher than two months ago.



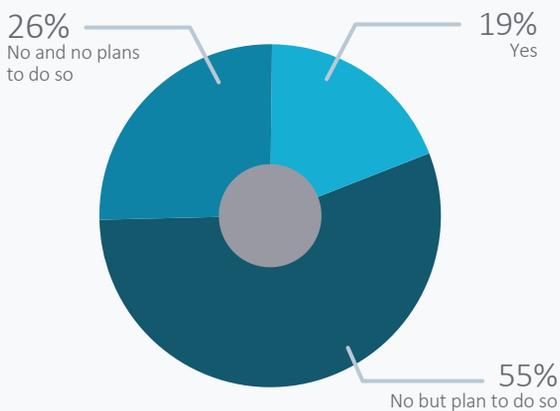
Among the **measures** introduced **for employees** traveling during COVID-19, additional pre-trip approvals, specific travel advice and traveler tracking are used the most.



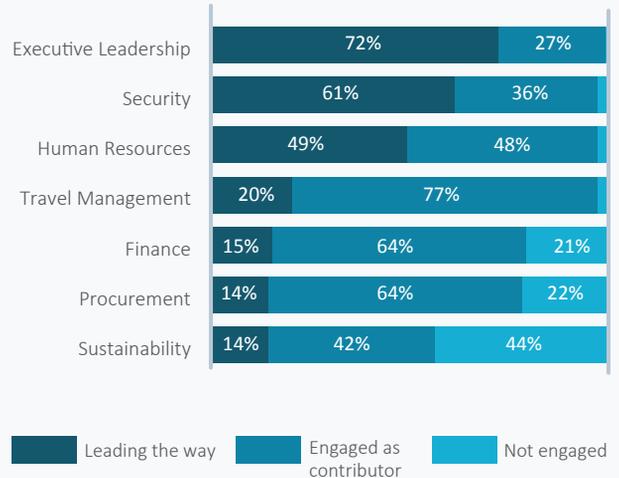
When planning for a **return to normalcy**, 7 in 10 consider business travel a contributor, while 16% see it as central to the plan.



More than a half of respondents aren't currently collecting **traveler feedback** about their new needs when travel resumes, but they are planning to do so.

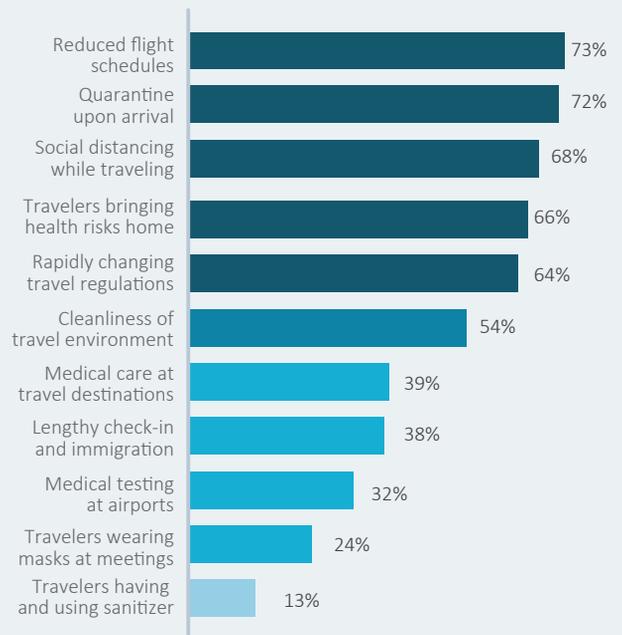


According to three-quarters of respondents, travel management is a **stakeholder** in the **return to normalcy** plan.

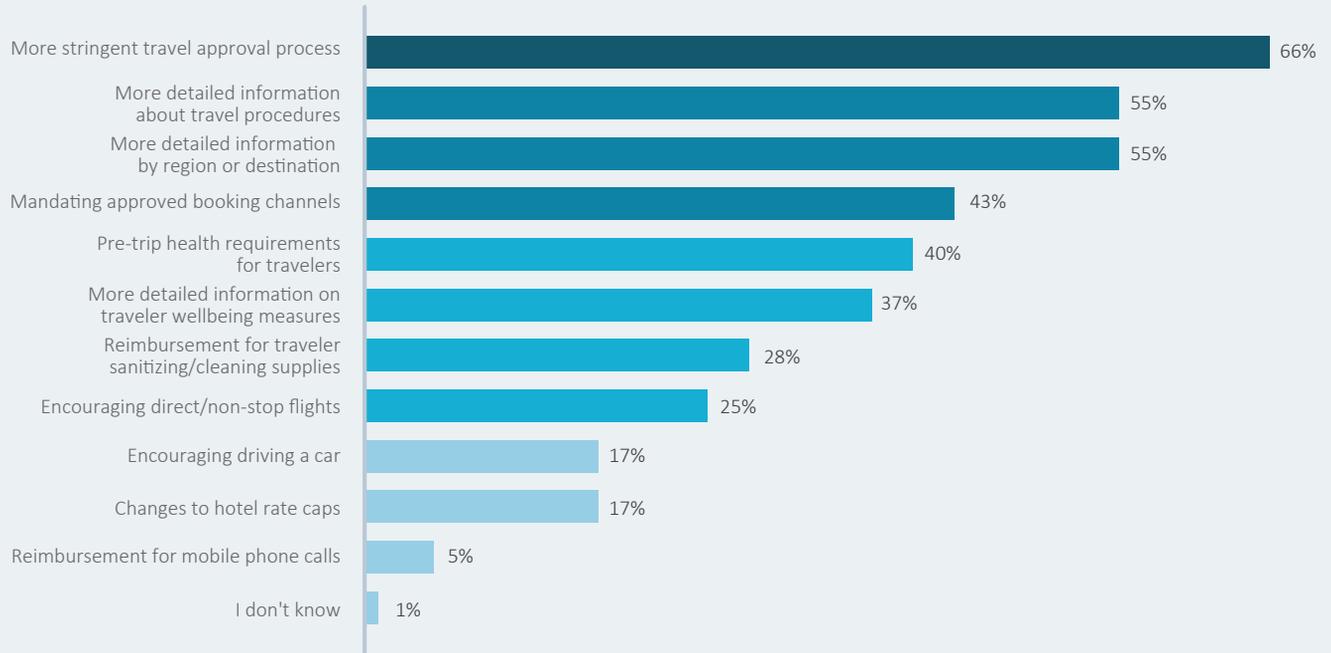


Other stakeholders engaged in the return to normalcy plan:
Operations, Legal, Risk, Health and Safety, Communications, Sales

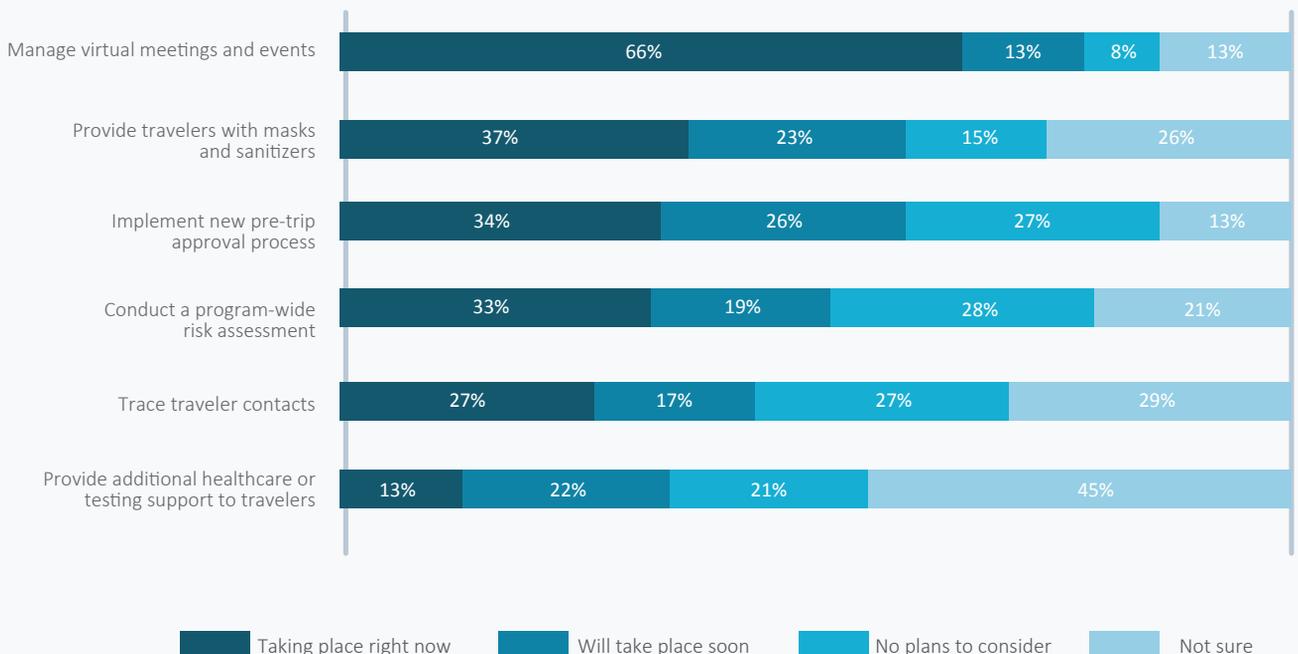
Reduced flight schedules and quarantine upon arrival are the top two **travel program challenges** when the restrictions are lifted.



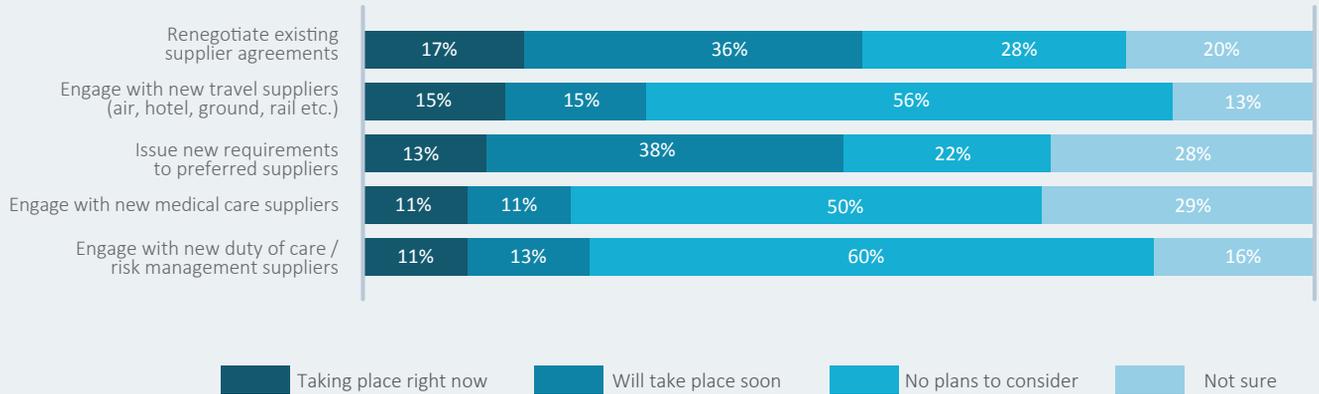
As a result of the pandemic, **travel policy will change**, with a stricter approval process and more detailed information about travel procedures and destinations topping the list of changes.



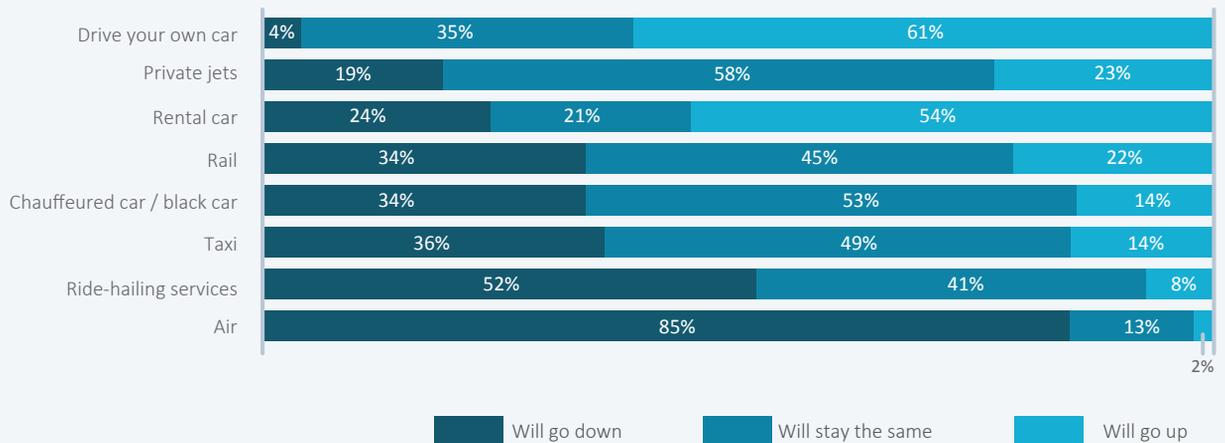
Travel buyers are considering various **travel management changes**. Managing virtual meetings and events is one of them: Two-thirds are currently involved in virtual meetings management, and this number is expected to rise.



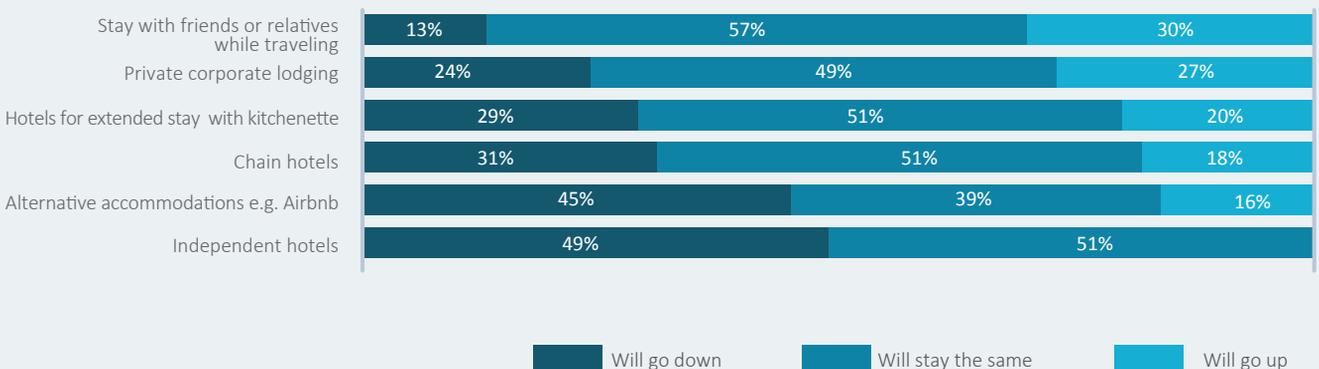
Among anticipated **supplier management changes**, re-negotiating existing agreements and issuing new requirements to preferred suppliers are expected to take place soon. Most respondents do not intend to engage with new suppliers.



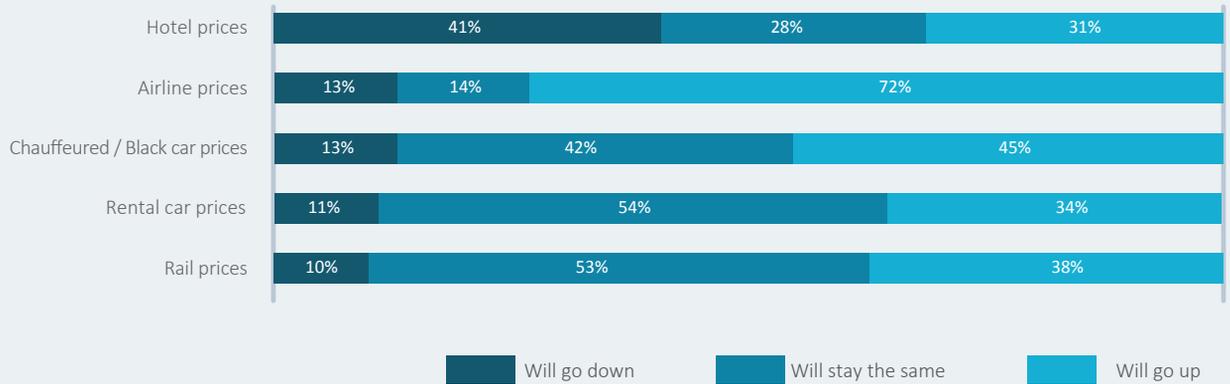
When restrictions are lifted, **buying behavior** is expected to change. When considering **travel modes**, 6 in 10 respondents expect the frequency of travel by car - private or rental - to increase. Airplanes will be used less often according to 85% of travel buyers.



Looking at **accommodation**, independent hotels and alternative accommodations are most exposed to lower business travel bookings. Staying with friends or relatives is expected to become more popular.



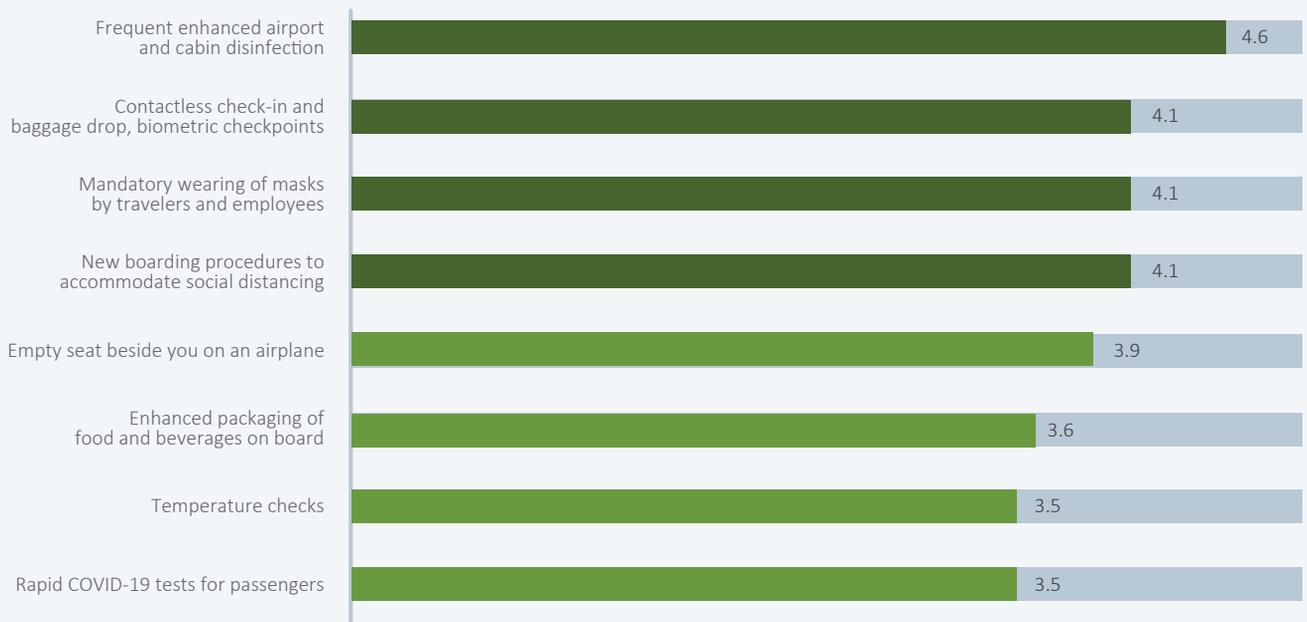
 Looking at **travel costs**, three-quarters of travel buyers anticipate higher airfares. Opinion is divided on the outlook for hotel rates.



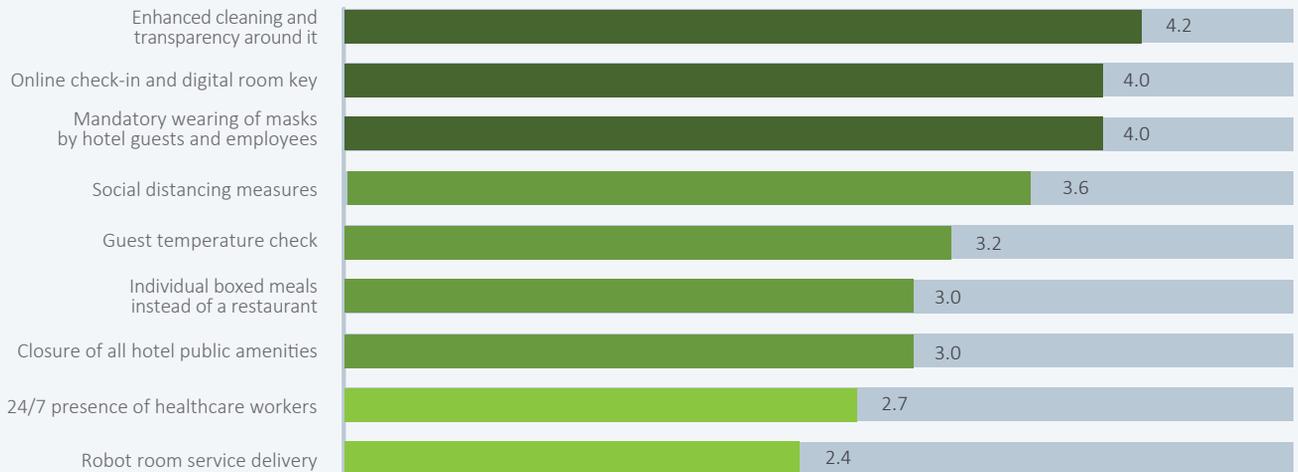
Travel buyers shared their views on various **measures** adopted by travel suppliers to ensure safe travel in the near future. Their opinions largely coincided with the views of travelers that we reported in a [COVID-19 Traveler Study](#).

The results are based on a weighted average of five-point scale ratings from "not important at all" to "extremely important."

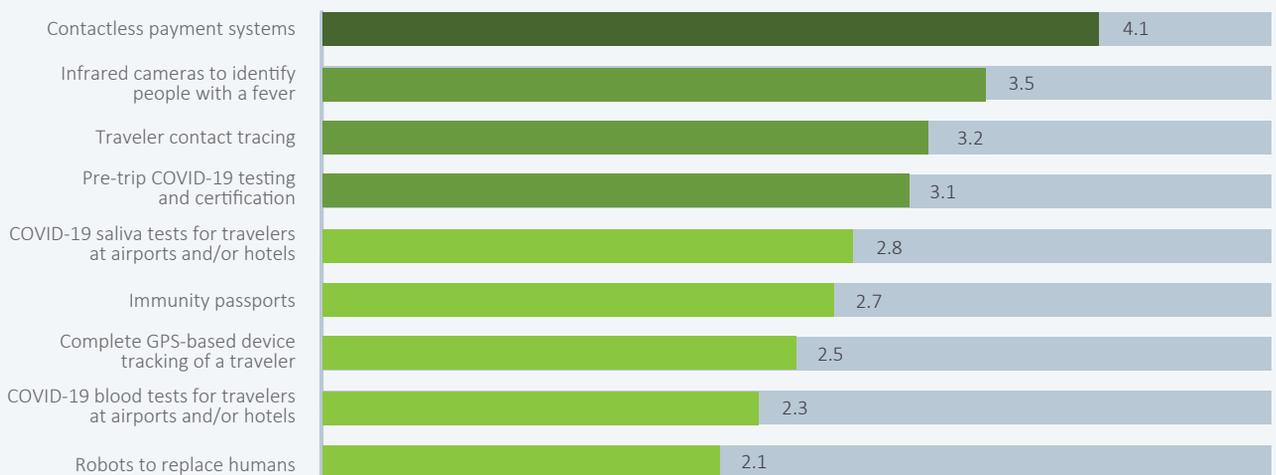
Among the measures taken by **airlines and airports**, frequent enhanced disinfection is considered the most important. Contactless check-in and baggage drop, mandatory masks and new boarding procedures to accommodate social distancing are among the top four.



Similarly, the list of measures adopted by **hotels** is led by enhanced cleaning and transparency around it. This is followed by online check-in and digital key and mandatory wearing of masks by hotel guests and employees.



Among the **regulatory measures**, contactless payment and use of infrared cameras for temperature checks are considered most important.



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