

Business Traveler Safety and Well-Being



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Key Findings

■ Travel managers and frequent business travelers have different ideas about the defining components that should be included in a traveler well-being program.

■ Very few organizations have a comprehensive traveler well-being program in place. A more common approach is to incorporate some aspects of traveler safety and well-being into an organization's overall health and wellness program.

■ More than half of travel managers surveyed said their organizations do not measure or monitor traveler satisfaction with their safety and well-being initiatives in any way. Most frequent business traveler respondents said their organizations do.

■ Travel managers and frequent business travelers overlap on what they consider the most useful methods to determine traveler safety and well-being needs. To a much greater degree than travel managers, frequent business travelers want their voices to be heard in variety of ways, including individual post-trip interviews, forums and roundtables.

■ There are significant gaps between what frequent business travelers want in their organizations' traveler safety and wellness programs and what organizations are currently providing—or willing to provide. These differences emerge in several key areas, from benefits and policies around traveler wellness to education and advice, as well as expectations around how much support road warriors should get.

■ There are a few notable exceptions, but there are more similarities than differences in the supplier options most travel managers and frequent business travelers identify as highly important to support safe and healthy business travel.

■ Most business travelers always or frequently experience multiple impacts from travel on their personal lives, including their relationships and their physical, mental, and emotional well-being. Most also regularly experience reduced productivity, diminished job satisfaction, and loss of confidence that they can fulfill their commitments.

■ Travel Management Companies (TMCs) and travel management programs help most travel managers support the health, safety, and/or well-being of their business travelers.

■ Supplier offerings and internal organizational initiatives around traveler wellness and well-being are influencing the buying decisions of travel managers and the outcomes from business trips for many organizations.

Business Traveler Safety and Well-Being

As understanding of the impacts of frequent business travel grows, travel managers—and travelers—are increasingly focused on what can and should be done to maintain the health and well-being of travelers who are often on the road.

Many studies have examined and illustrated the wellness downside of frequent travel, including recent research by Harvard Business Review¹ that identified a strong correlation between the frequency of business travel and a wide range of physical and behavioral health risks. While travel managers may well be aware of many of these issues, determining how best to address them can be a daunting task.

Travel managers grappling with the complexities inherent in implementing a traveler well-being program are encountering significant gaps between what they believe the programs should include and what business travelers say they need, according to results of this study, sponsored by TripActions, of both travel managers and frequent travelers.

Most travel managers identify policies, training and reporting as the most important elements of a traveler wellness

program. Frequent business travelers are far more focused on program components that directly impact the practical realities they encounter when traveling for business.

While travel managers and business travelers both identify the same impacts on health and well-being resulting from frequent business travel, there appears to be a disconnect in perspective over how often these impacts occur.

To better understand the current state of traveler safety and wellness programs, the BTN Group conducted an online survey of both frequent business travelers and traveler managers. The research examined a broad range of themes related to traveler well-being programs, from the organizational challenges travel managers encounter in implementing the programs to the components that define well-being programs and the most common practices and strategies to measure their success. The research also covered the needs and impacts of business travel identified by frequent business travelers, as well as how, or if, travel managers and organizations respond.

The Impacts of Business Travel

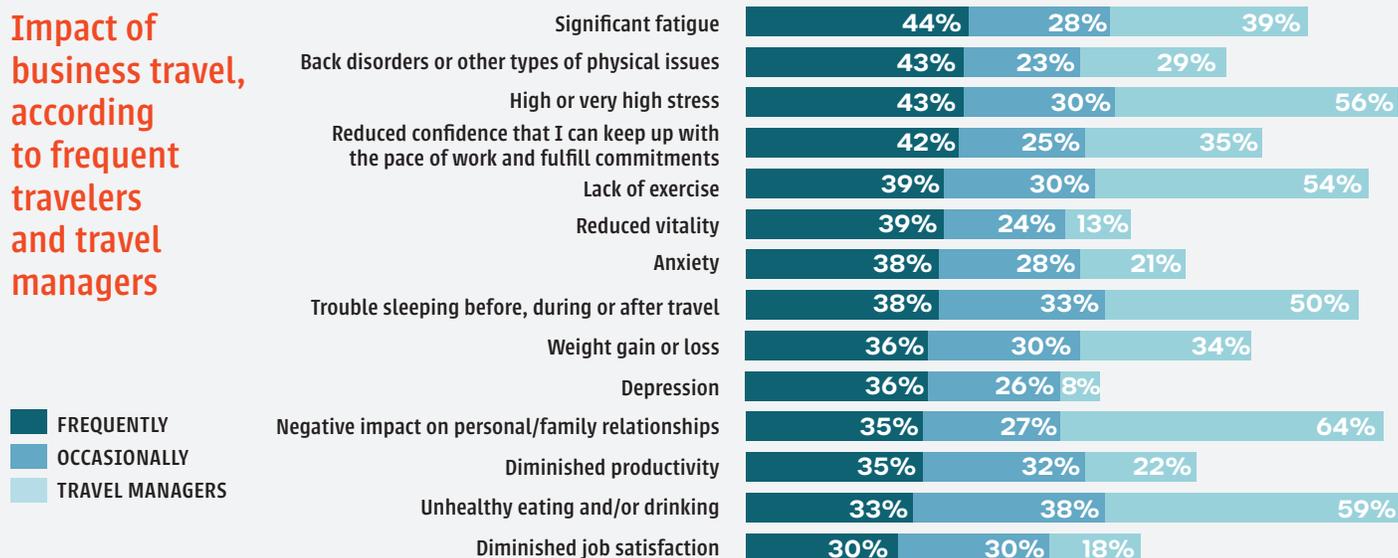
As every travel manager knows, frequent business travel can take a toll on travelers.

Most frequent traveler respondents (83%) work extra hours to make up for time they lost while traveling, including 53% who always do so, and 30% who frequently log extra hours to compensate for time lost while traveling.

A majority of frequent travelers surveyed report that business travel has an impact on their personal lives, including their relationships and their physical, mental, and emotional well-being, as detailed in Chart 1.

CHART 1

Impact of business travel, according to frequent travelers and travel managers



Source: Business Traveler Safety and Well-Being online survey of 160 corporate travel decision-makers and 106 frequent business travelers, fielded March-April 2020 by BTN Group Content Solutions for TripActions

1 "Just How Bad is Business Travel for Your Health? Here's the Data," Andrew Rundle, Harvard Business Review, May 31, 2018, <https://hbr.org/2018/05/just-how-bad-is-business-travel-for-your-health-heres-the-data>

The Travel Manager Perspective

According to a majority of travel managers surveyed, the top five most serious impacts of frequent business travel are on the relationships and some aspects of physical health, as indicated in Chart 1 on Page 4. It appears that frequent travelers are reporting more serious health impacts of business travel than travel managers recognize. At the least, there appears to be a disconnect between travel manager and traveler views of the negative aspects of frequent business travel.

Defining A Traveler Wellness Program

Given the variances in how different organizations and businesses approach traveler safety and well-being, there is no single or simple way to define what constitutes a business traveler wellness program. One thing is clear: Travel managers and frequent business travelers have different ideas about the definitive components that should be included.

Travel managers are strongly focused on policies, training, and reporting.

Most (72%) cited policies that balance traveler safety and well-being with savings—such as business class allowance for flights of six or more hours, and the availability of business-ready lodging—as key program components. A majority (58%) also identified as defining components training for travelers about why and how to ease the stress of travel, make healthy choices while on the road, and keep up their productivity.

Reporting the impact of travel disruptions and other elements that could trigger higher stress levels to both travelers and their managers is considered an important element of a traveler well-being program by 56% of travel manager respondents. Just under half (49%) said reminders about making good choices and eliminating stress while traveling are also defining components of a traveler safety and wellness program.

Frequent business travelers have a somewhat different perspective. Their primary focus is on program components that directly impact the practical realities they encounter when traveling for business.

While no component was cited by a majority of frequent travelers surveyed, the highest percentage of respondents (43%) want a wellness program to include monitoring travel delays and disruptions accompanied by offers to upgrade, avoid connections, or enjoy other perks on their next trip. A significant minority of respondents (40%)—far fewer than travel manager respondents—also cited policies that balance traveler safety and well-being with savings as key program components.

Many frequent business travelers also said wellness training, guidance, and reminders are defining components of a safety and well-being program, including:

- › Reminders about making good choices and eliminating stress while traveling **(39%)**
- › Manager guidance on the impact of travel and what to do about it **(37%)**
- › Training about why and how to ease the stress of travel, make healthy choices while on the road, and keep up their productivity **(36%)**

State of Programs in Practice Today

Organizations take many different approaches to support the safety and well-being of their travelers. Initiatives cover a wide spectrum, from the type of programs they have in place—if any—to the methodologies they use to understand what their travelers need and measure how satisfied travelers are with the support they are getting.

Wellness programs vary, “from a simple mention in the travel policy regarding vaccinations to a completely supported program which would include easily accessible information (both pushed messaging, and pulled from various sources), a website for reference information, a supplier that provides location support, and possibly a medical professional hired by the company,” said Cindy Shumate, a corporate travel management consultant who previously held senior-level travel management positions with Regeneron Pharmaceuticals, Princeton University and United Nations Development Programs.

“The depth of these programs varies considerably depending on how much international travel a company has had in the past, or if they have had issues at any of their company locations,” she added. “These issues generally provide the trigger for greater focus.”

Most organizations do not have a comprehensive program in place to support traveler safety and well-being. A minority of survey respondents, including 23% of travel managers and 19% of frequent business travelers, work in a business or organization that has a comprehensive wellness program in place. A more common approach is to incorporate some aspects of traveler safety and well-being into an organization’s overall health and wellness program, a practice reported by 37% of travel managers and 23% of frequent business travelers.

“The challenge is that traveler wellness programs cross department boundaries,” said Nicole Hackett, Vice President of Client Services at Elizabeth Neumann Company, a social media consultancy. During her time as Director of Travel Services at Graham Holdings, Hackett developed VisFIT, an integrated mobile platform described as a concierge for healthy travel.

“Cost saving tends to be everyone’s job so it doesn’t matter where travel reports to in order to run your managed travel program, whereas who ‘owns’ a traveler wellness program is not clear,” she said. That all comes down to company culture, “and who has the strength to be a trendsetter and/or collaborator in their organization.”

On the other end of the spectrum, some organizations have no traveler safety and well-being program or policies, leaving it mainly up to travelers to take care of themselves on the road. That's the case for a minority of survey respondents, including 13% of travel managers and 18% of business travelers.

According to Shumate, some companies might not see the need for a traveler wellness program because they believe their employees travel to fairly 'safe' destinations, or they haven't had any issues in the past. Or, she added, "maybe travelers don't report how often they actually do get sick while traveling, which leaves a company without recognition that this could be an issue they need to address."

and traveler input into a personal portal (39%).

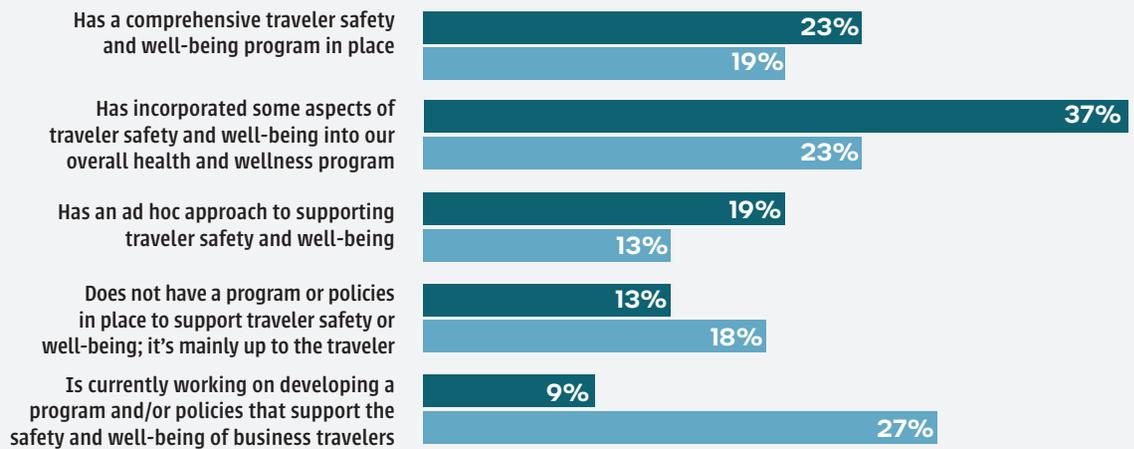
Interestingly, a majority of travel managers (54%) said their organizations do not measure or monitor traveler satisfaction with their safety and well-being initiatives in any way. Among the two-fifths of travel manager respondents who work for companies that do track traveler satisfaction in this area, most use employee engagement or satisfaction surveys (69%) and/or TMC reports on delays, disruptions, and cancellations (53%).

Understanding the real-life needs of business travelers is foundational to the success of any organization's traveler safety and well-being program, and survey responses clearly indicate that a majority of business travelers want their voices to be heard in a wide variety of ways. For starters, 82% of business travelers said the most useful

CHART 2

Which of the following best describes your organization's approach to supporting the safety and well-being of travelers?

TRAVEL MANAGERS
FREQUENT BUSINESS TRAVELERS



Source: Business Traveler Safety and Well-Being online survey of 160 corporate travel decision-makers and 106 frequent business travelers, fielded March-April 2020 by BTN Group Content Solutions for TripActions

Who Is Responsible for Traveler Wellness?

A sizeable majority of travel managers surveyed in the research (88%) believe healthy business travel is a shared responsibility between employer and employee. By comparison, most frequent business travelers surveyed (54%) believe their employer is primarily responsible for healthy business travel. Only 15% of travelers said it should be a shared employer-employee responsibility, and 31% said they are personally responsible for their own well-being while on the road.

Measuring and Monitoring Satisfaction with Wellness Programs

A compelling majority of business travelers surveyed (89%) said they work for an organization that measures or monitors their satisfaction with traveler safety and well-being initiatives. Among those respondents, the primary methods used are: employee engagement or satisfaction surveys (55%); app-based programs (40%); TMC reports on delays, disruptions, and cancellations (40%);

method to understand their safety and well-being needs is to collect traveler feedback on a regular basis. Other methods identified by a majority of business travelers as extremely or very useful in determining their needs include:

- Traveler satisfaction scores **(77%)**
- Post-trip traveler surveys **(76%)**
- Employee focus groups or roundtables **(76%)**
- Individual traveler interviews on returning from a business trip **(75%)**
- TMC data analysis of trips, disruptions, etc. **(75%)**

With the exception of focus groups, most travel managers identify the same elements as extremely or very useful in determining the safety and well-being needs of their travelers. However, significantly fewer travel managers surveyed find these elements highly useful compared with business traveler responses:

- Collecting traveler feedback on a regular basis **(73%)**
- Traveler satisfaction scores **(61%)**

- › TMC data analysis of trips, disruptions, etc. **(58%)**
- › Post-trip traveler surveys **(57%)**
- › Individual traveler interviews on returning from a business trip **(57%)**
- › Employee focus groups or roundtables **(49%)**

While 17% of travel managers said employee focus groups or roundtables have little or no usefulness in helping them determine traveler needs around safety and well-being, 76% of business travelers—and 95% of the frequent business travelers, those who log more than 12 trips per year—said focus groups and roundtables are extremely useful in determining what they need for safety and well-being when traveling for business.

What Business Travelers Want

There are significant gaps between what frequent business travelers want in their organizations' traveler safety and wellness programs and what organizations are currently providing—or willing to provide. These differences emerge in several key areas, from benefits and policies around traveler wellness to education and advice, as well as expectations

around how much support road warriors should get.

To begin with, overwhelming majorities of both travel managers (99%) and frequent business travelers (93%) agree to some extent that all organizations should establish and regularly update programs, policies and/or guidelines that support the physical and mental health of their business travelers, especially frequent business travelers.

However, significantly more frequent business travelers feel strongly about the issue; 67% strongly agree compared with 54% travel managers who strongly agree that all organizations and companies should establish and regularly update their safety and wellness programs. Just under half (45%) of travel managers and just over a quarter (26%) of frequent business travelers somewhat agree with that statement.

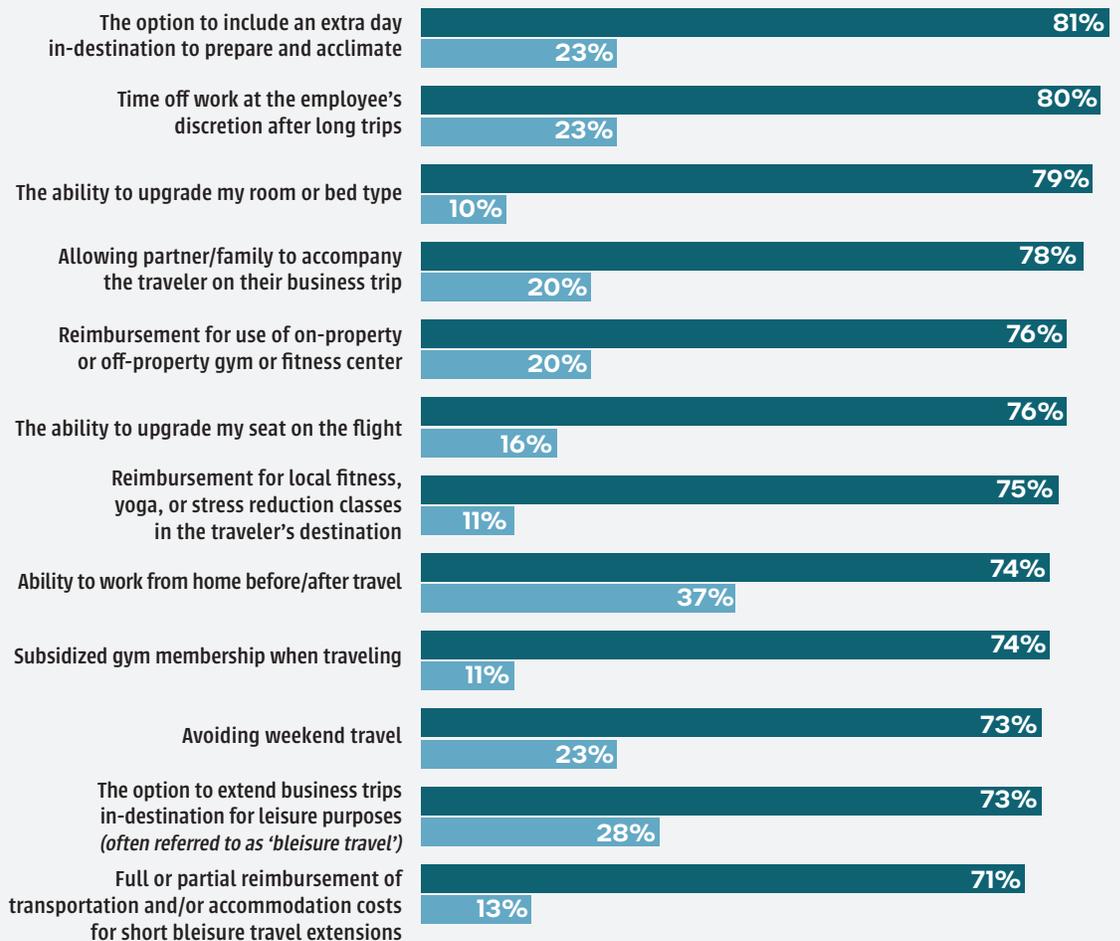
What Matters Most: Benefits and Policies

Survey results illustrate a disconnect between what travelers themselves identify as highly important to support their well-being when traveling for business, and what travel managers deem most important and what their organizations actually provide.

CHART 3

Wellness benefits and policies; the gap between what travelers want, and what they get

- FREQUENT BUSINESS TRAVELERS:** These benefits/policies are highly important in terms of supporting the well-being of business travelers.
- TRAVEL MANAGERS:** My organization provides these benefits/policies to support the safety and well-being of business travelers.



Source: Business Traveler Safety and Well-Being online survey of 160 corporate travel decision-makers and 106 frequent business travelers, fielded March-April 2020 by BTN Group Content Solutions for TripActions

› **Prep time and time off:** Four-fifths of frequent business travelers identified getting an extra day in-destination to prepare and acclimate, and taking time off at their own discretion after long trips, as extremely or very important to their well-being. By comparison, more than two-fifths of travel managers surveyed consider those benefits not at all or only somewhat important to support the safety and well-being of their travelers.

› **Keeping fit on the road:** Three-quarters of business travelers surveyed said subsidized gym membership, and reimbursement for local fitness, yoga, or stress reduction classes in their destination, are highly important to their well-being on the road.

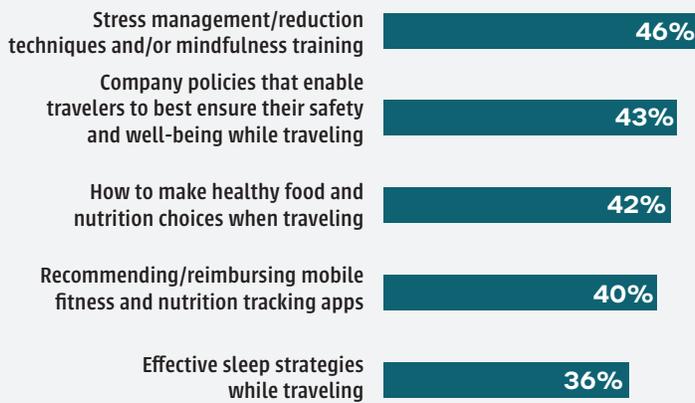
Travel managers have a different perspective: 66% said reimbursement for local fitness, yoga, or stress reduction classes in the traveler's destination has little or no importance in supporting traveler well-being, and 49% said their organizations are unlikely to provide that benefit. Subsidizing gym membership for business travelers while on the road was identified by 63% of travel managers as having little or no importance in supporting traveler well-being, and 61% said it is unlikely that their organizations would do so.

› **Traveling with a partner:** Allowing a partner and/or family member to accompany them on a business trip was one of the top five benefits identified by frequent business travelers, cited by just under four-fifths of traveler respondents as a highly important benefit to support their well-being. According to a strong majority of travel manager respondents (69%), that benefit has very little or no importance in supporting traveler well-being, and 44% said their organizations are unlikely to provide it.

CHART 4

What are the five most important types of education and/or advice organizations can provide to enhance and support the safety and well-being of their business travelers?

FREQUENT BUSINESS TRAVELERS



TRAVEL MANAGERS



What Matters Most: Education and Advice

When it comes to education and advice that enhances and supports traveler well-being, policies that enable travelers to best ensure their safety and well-being tops the list for the majority of travel managers surveyed (74%). Stress management and reduction techniques and/or mindfulness training are the top choice for the biggest percentage of business traveler respondents (46%).

Advice on how to handle jet lag was identified by one-third of travel managers surveyed, cited by 33% of respondents, but only 25% of business travelers deem it an important educational component of a traveler well-being program. Two-fifths of business travelers said getting recommendations and/or reimbursement for mobile fitness and nutrition tracking apps is important; just 19% of travel managers surveyed had the same perspective.

Many frequent business travelers are concerned with healthy eating on the road. Just over one-third said it is important to get recommendations from their organizations on airport eateries and in-destination restaurants with healthy menus and food choices. Far fewer travel managers consider it important to traveler well-being to provide recommendations on in-destination restaurants (19%) or in-airport eateries (12%).

What Matters Most: Supplier Options

There are a few notable exceptions, but there are more similarities than differences in the supplier options most travel managers and frequent business travelers surveyed identify as highly important to support safe and healthy business travel, and traveler well-being and satisfaction.

Choice and flexibility around air travel top the list of extremely or very important supplier-related options for the greatest percentage of frequent business travelers surveyed. The ability to make their own choices related to

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accommodations and ground transportation are also cited by a strong majority.

- › Traveler flexibility and choice around air suppliers **(83%)**
- › Prioritizing direct flights **(82%)**
- › Flexibility to change flights **(82%)**
- › Traveler flexibility and choice around type and location of accommodations **(82%)**
- › Traveler flexibility and choice around ground transportation **(81%)**
- › Choice of flight arrival/departure times **(80%)**
- › Hotel room upgrades **(79%)**
- › Option to upgrade to economy plus or business class on longer flights **(77%)**
- › Lounge access **(77%)**
- › The option to book a sharing economy accommodation rather than a hotel room **(72%)**

Travel managers identified most of the same supplier-related options as highly important to safe and healthy business travel and traveler well-being and satisfaction, although in smaller percentages and with a few notable exceptions.

Compared with frequent business travelers, 21% fewer travel manager respondents said traveler flexibility and choice around air suppliers is highly important for traveler safety and satisfaction. Fewer than half of travel managers identified lounge access (46%) and hotel room upgrades (44%) as highly important compared with close to 80% of frequent business travelers surveyed.

The greatest differential in perspective is around sharing economy accommodations. Compared with 72% of frequent business travelers, just 24% of travel managers said the option to book a sharing economy accommodation rather than a hotel room is extremely or very important to the safety, health, well-being and satisfaction of business travelers.

Do Road Warriors Deserve More?

Opinion is divided regard how much support should be afforded road warriors—an organization's most frequent business travelers.

An overwhelming majority of business travelers (93%) believe their organization should provide more support and benefits for road warriors than for occasional business travelers, including 61% who strongly agree and 32% who somewhat agree. It is worth noting that nearly 20% of frequent business traveler respondents said they travel 12 or more times a year for business and the survey excluded those who traveled fewer than three times a year.

Significantly fewer travel managers (77%) agree that road warriors should get more support than occasional business travelers, including 27% who strongly agree and 50% who somewhat agree. Close to one-quarter of travel managers surveyed (24%) said they disagree that there should be any differentiation in the support or benefits

business travelers receive regardless of their frequency of travel. Many travel managers have relied on loyalty program status to ensure that frequent business travelers enjoyed priority boarding, seat upgrades, free checked bags, upgraded hotel rooms or other benefits. But increasingly, travel managers have focused on ways to help infrequent travelers, either through education or other means.

Is a 'Thank You' Necessary?

Should travel managers express appreciation in some form to their frequent business travelers? The answer is yes, according to majority of travel managers (67%), although few are doing so as a standard practice. Just under a third (30%) said their organization makes it a point to acknowledge and express appreciation to business travelers for their efforts and on-the-road schedule, and 37% said they don't do it as often as they probably should.

About a third of travel manager respondents have a different take on the matter. A full 33% of respondents said they do not make any effort to acknowledge and express appreciation to their business travelers because travel is just part of their jobs.

The Role of TMCs and Travel Management Platforms in Traveler Well-being

TMCs are involved in supporting the well-being of business travelers for a majority of travel managers surveyed. Just under seven out of 10 (69%) said their TMC is actively involved in helping them support their travelers' well-being, including 23% who get a lot of support from their TMC and 46% who get some level of support.

Among the 31% of travel managers surveyed who said they don't get TMC support around traveler well-being, 16% feel they feel they should get that support, and 14% said they don't believe that's the TMCs responsibility.

Just over half of travel managers surveyed said their corporate travel management platforms are involved to some extent in supporting the health, safety, and/or well-being of their business travelers.

A travel management platform enables 52% of travel manager respondents to ensure the safety and well-being of their traveling employees. The travel management platform of 51% of travel managers surveyed provides data and insights that enable them to make real-time decisions about travel policy to ensure the health and safety of their traveling employees.

The Impact of Wellness Programs on Business Outcomes

Supplier offerings and internal organizational initiatives around traveler wellness are influencing the buying decisions of travel managers and the business outcomes for many organizations.

- › **Buying decisions:** The wellness-focused services,

products, amenities, and/or healthy dining options offered by travel suppliers have an impact on travel buying decisions and preferred supplier choices for 65% of travel managers surveyed, including 16% who said those offerings have a significant impact on their supplier decisions and choices.

Hackett anticipates that will significantly increase when business travel picks after stay-at-home orders are lifted. “Much like sustainability was the buzz a few years ago and travel buyers changed their procurement methods to include questions around green initiatives, I expect to see new RFP questions around sanitization practices and amenities,” she said. “Clean will be the new green.”

› **Business outcomes:** While measuring the direct impact of traveler wellness and well-being programs on business results remains an elusive goal for most organizations, 75% of travel managers and 93% of frequent business travelers surveyed said there is a direct relationship between supporting the safety and well-being of business travelers and positive business outcomes from their travels. Just over one-fifth of travel managers (22%) said they weren’t sure if there is any impact as it is too difficult to measure.

Shumate said the point of investing in a traveler wellness program, as well as any other corporate wellness programs, is to generate greater business outcomes. “The stress factors of traveling from one place to another are inherent in the process itself,” she said, “so anything that helps a traveler stay rested, nourished with quality food, well informed, and supported with time and effort efficiencies means that that traveler can place more focus on the

intended business purpose of the trip with a clear head and open and creative mind.”

› **Hiring and retaining talent:** The story is different when it comes to how—or if—safety and wellness programs impact an organization’s talent pool. While 23% of travel manager respondents said their organization’s traveler safety and well-being policies and practices have a positive impact on attracting and/or retaining talent, 66% have not seen any positive or negative impact on the talent pool that is directly related to their organization’s approach to traveler safety and well-being. A minority (11%) believe their organization’s approach to traveler safety and well-being has had a negative impact on attracting and retaining talent.

The Elusive Quest for Work-Life Balance

As with so many other elements of traveler wellness and well-being programs, there is a big divide between how travelers and travel managers perceive the efficacy of those programs in meeting the needs of their business travelers for work-life balance. Surprisingly, most frequent business travelers give their organizations high marks for supporting their work-life balance while most travel managers believe they can do a lot better in providing that support.

A majority of frequent business travelers (68%) said their organizations are highly effective at supporting work-life balance for business travelers, and an additional 29% said their efforts are somewhat effective.

That compares with just 29% of travel managers surveyed who gave their organizations a highly effective rating for supporting the work-life balance of their business travelers. Just under 60% of travel managers said their efforts to support the work-life balance for business travelers are somewhat effective, and 11% said their efforts in this area are not at all effective.

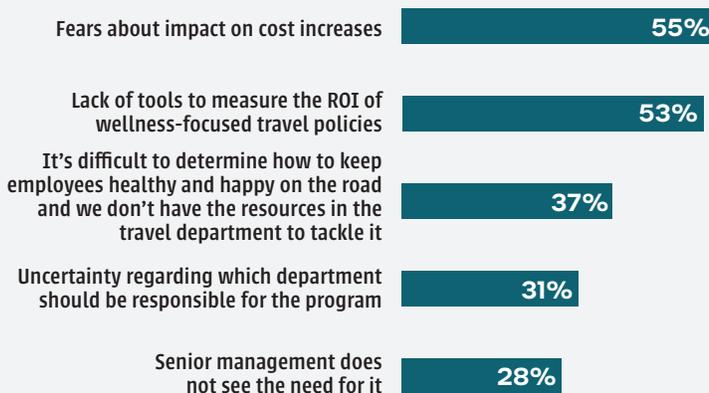
Challenges to Implementing Traveler Well-being Programs

Well-being programs specifically designed to support the safety and well-being of travelers are challenging to develop and implement, and travel managers surveyed said they encounter a variety of impediments in their efforts to do so.

Concerns about cost increases generated by the program and a lack of tools to determine the actual ROI of wellness travel policies are the top two challenges encountered by a majority of travel managers surveyed. For some, organizational issues also impede implementation of a well-being program, from a lack of resources in the travel department to uncertainty about where responsibility for that program should reside in an organization’s internal structure. Senior managers who do not see the need for a traveler well-being program is also a roadblock in some organizations.

CHART 5

Have you encountered any of the following challenges/impediments to implementing an effective traveler well-being program in your organization?



Source: Business Traveler Safety and Well-Being online survey of 160 corporate travel decision-makers, fielded March-April 2020 by BTN Group Content Solutions for TripActions

Concluding Insights

While there is common agreement on the value of face-to-face business travel, awareness of the health and wellness downsides of frequent business travel is growing, along with sentiment among frequent business travelers that companies have an obligation to address those impacts.

Concern over cost is the primary impediment most travel managers encounter in implementing a traveler wellness program, but there are several program components highly valued by travelers that require very little financial investment. These include:

- › Policy changes that allow travelers more freedom of choice around air travel and accommodation options that better meet their needs.
- › Policy changes that enable reimbursement for a variety of fitness options, including hotel fitness centers and local classes.
- › Careful consideration of vendor health and well-being offerings when selecting preferred suppliers.
- › Implementing educational components and practical recommendations related to travel including reducing stress, eating healthy and improving sleep while on the road.

As business travel resumes, the time is right for travel managers to examine their traveler safety and wellness programs and realign them with traveler needs. ■

Survey Methodology

BTN Group Content Solutions fielded an online survey about traveler safety and wellness initiatives in managed travel programs in late March through early April 2020, just after most business travel was halted due to Covid-19. BTN Group partnered with Equation Research to gather responses from 106 business travelers who travel for business four or more times a year and work for an organization that requires them to follow specific booking policies and/or cost guidelines. More than two-thirds of the business traveler respondents said they take more than seven business trips a year and more than one-third take more than 10 trips a year. For the insight of corporate travel managers, BTN Group gathered responses from more than 160 corporate decision-makers responsible for setting travel and expense policies; managing business travel expenditures; selecting or recommending business travel suppliers; or analyzing and reporting travel expenses or trends within their organizations. The survey and white paper were sponsored by TripActions.

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